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Open-i Quotations - Motor Guide (6.00T)

Click on a chapter title below to view it:

Open GI

1: Getting Started

Getting Started

Motor is a versatile Insurance Information and Quotation package designed to work on PCs. Provided with all the relevant factors, (details of driver/drivers, vehicle, cover, etc.) the application allows you to calculate quickly and accurately the premiums currently offered from a selection of over 500 companies and schemes. The system determines the guarantee based on the details entered.

Many insurers offer discounts for certain vehicle security devices, some even insist that suitable security is included before offering a policy. Motor includes an approved list of security devices that allow you to calculate accurate and guaranteed premiums.

Motor can be integrated with the Open GI Core Back-Office system (Broker Office Management System). This allows you direct access to the Core Back-Office private car policy details for automatic renewal and re-quotation.

This manual describes the Open-i version of Motor.

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About This Manual

This manual aims to provide you with the instructions to be able to use the Motor application quickly and efficiently. Each chapter describes a task or group of related tasks which you need to perform in order to achieve an objective, such as producing a quote or a proposal. The manual consists of the following chapters together with a detailed index:

- Getting Started - this chapter introduces you to Motor and its main functions. If you are a new user of the system or have only used Core Back-Office before we strongly recommend that you read this chapter.

- System Maintenance - this chapter describes how to use the Motor maintenance options to configure the system to your requirements.

- Entering Quotation Details - this chapter details how to complete the quotation screens.

- Generating Quotes - this chapter details how to generate quotes for selected or all insurers.

- Transferring Data - this chapter details how to transfer data from/to Core Back-Office if you are connected to Core Back-Office.

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Before You Start

This section introduces you to the following features of MotorWriter which are common to all operations:

- Entering Information

- Main Key Functions In MotorWriter

- Understanding The MotorWriter Quotation Screen

- Understanding MotorWriter Menus

- How To Use The Display/Select Windows

- [User Help](#)

Entering Information And Using The RETURN Key

The RETURN key tells the system to accept whatever information you have just typed at the keyboard. Until you press RETURN you can change the characters you have typed by deleting them individually using the BACKSPACE key; you can the re-type the characters as required.

Main Key Functions

MotorWriter provides you with key functions which allow you to navigate through the quotation process and access other menus. The following tables summarise the main key functions available.

The Tripos version of MotorWriter provides you with key functions which allow you to navigate through the quotation screens and access other menus. The following table summarises the main key functions available:

Keys	Description of function
ESC F1	This allows you to access the *Escape Options* menu.
Quote All button (**ESC A**)	When you have completed details for a quotation use this function to generate a list of quotations for all insurers.
Maintenance button (**ESC B**)	This function allows you to access the *Broker Maintenance* menu.
New Risk button (**ESC C**)	If the client does not require the quotation or a proposal you can clear the quotation details using this function.
ESC E	This function allows you to access and amend any existing quotation details for an existing customer. You can then perform a Mid-Term calculation to allow for the changes.
Jump to Driver button (**ESC J)**	This function allows you to jump to additional driver input screens or the [Enrichment screen.](#)

Load Risk button (**ESC L)**

This function allows you top load details entered in a Risk Level Detail screen for a customer selected in Core Back-Office.

ESC M

This function allows you to access the mid-term calculator which recalculates a premium due to any policy amendments.

Quote Selected button (**ESC Q)**

When you have completed entering information use this function to generate a list of quotations for selected insurers in an insurer list.

Toggle Options button (**ESC T)**

This function allows you to access the *Toggle Options* menu which you can use once you have generated quotes.

ESC W

This function allows you to select the working for a specific insurer by entering the insurer code.

Accept button **(RETURN)**

Accident/Conviction Summary button (**ESC X)**

This function allows you to view a summary of accident and conviction details.

Swap to Back Office button (**ESC Z)**

This function allows you to return to the Core Back-Office menu from MotorWriter or vice-versa.

Using ESC **Z** to swap to Core Back-Office should only be used when you whish to suspend the current task in MotorWriter - for example, to go back to an existing client record to confirm details to be entered into the quotation screen and then use ESC **Z** to go back in to MotorWriter and continue where you left off.

If you need to go back to Core Back-Office without saving the quote or using any of the options in the normal menu, you should use ESC ESC.

F1

For certain fields this key allows you to access a list of valid field entries and select the entry that

you require.

F3	This key allows you to return to the previous screen, particularly from popup windows.
F8, F9	These keys allows you to scroll though data lists displayed or within popup windows.
F10, F11	These keys allow you to scroll between the main quotation input screens.
F16 or CTRL E	Allows you to toggle the text entry mode between insert and overtype.
ESC ← **ESC** →	These keys move the cursor to the end or to the beginning of an entry field.
DEL	This key deletes backwards from the cursor point.
Exit button (**ESC ESC)**	This allows you to cancel the current operation and return to the previous screen. You can also use this key to quit MotorWriter.

Understanding The MotorWriter Quotation Screen

The MotorWriter screen is divided into two general areas, which are:

- Data entry and display area - this area of your screen is where your data is entered, changed or viewed. The screen is further sub-divided into 4 areas which deal with the main details of a quotation.

- User Help area - this area displays field help as you tab over fields. If an error occurs while you are working, a message may be displayed in this area.

Field Conventions

Each of the fields on the main screen is followed by one of the following:

( ) - A drop down list icon indicates that you can access a list of possible entries.

Menus, Display/Select Or Field Help And Pop-Up Entry Windows

The MotorWriter screens provide you with menus, *display/select* or *Field Help* and pop-up entry windows which are designed to assist you in the completion of a quote and use of MotorWriter functions.

There are three types of windows:

- Menus - these are re accessed using the buttons on the toolbar or using ESC combined with another key, for example the *Maintenance* menu which is ESC **B**.

- **display/select** or **Field Help** windows- these are accessed using the **F1** function key. Where a field requires specific information to be entered which is contained on the system, you can display the available data on the system and select it directly, from a data list.

- Pop-up entry window - these are accessed by entering "Y" in the relevant field, then, pressing TAB.

Menus

The following illustrates the options on a typical menu:

- Broker Reference

- Select Lists

- Area Downratings

- Broker Discounts

- Performance Factor

- Print Car Code List

- Insurer Details

Menus may vary in the options that they provide depending on which version of MotorWriter you have installed and how you operate the system.

The operation of menus is similar in both MotorWriter versions. To select a menu option use one of the following methods:

Use the mouse to move between the options and click to select or use the UP and DOWN ARROW keys to highlight the option that you require, then press RETURN.

Each option within a menu window contains a letter which appears bolder. If you enter the letter the option is selected automatically. For example to select the 'Select Lists' option from the *Maintenance* menu you would press "S", once the menu was displayed.

Display/Select Or Field Help

A typical display/select list in MotorWriter is displayed by pressing **F1** when the cursor is in the relevant field.

To select a specific type of data use one of the following methods:

- Use the **F8**/**F9** and ARROW keys to highlight the data that you require, then press RETURN. To view more data use the scroll keys.

- Data lists also contain bolder characters, however, these consist of more than one character and act as short codes that you can enter to select the data directly from the field, for example for **Co**m**p**uter **S**er**v**ices you could enter CPSV in the relevant field and the system would automatically update the field text to Computer Services.

    If you cannot remember the codes you can use the following method to locate items in a list:

- In long lists, such as countries, you can press the first letter of the item required to display the alphabetic section containing that item, for example, to access the United Kingdom, press "U", the system places the highlight over the first country beginning with "U". Then, use the **F8/F9** and ARROW keys to select United Kingdom.

Search Facility

MotorWriter also provides you with an additional search facility within each **Field Help** window.

At the bottom of a **Field Help** window the system provides you with an entry field which allows you to enter search criteria.

For example: To find the United Kingdom in the country list you can enter *United* or *Kingdom*. The system places the cursor on the first country entry with the word United or Kingdom within it.

Before pressing **F1**, you can also use the "*" character to define a search substring, for example to find any car make with the characters "st" you can enter "*st". The system will bring up the field help list for the make of vehicle and will highlight the first selection containing the characters "st".

Characters can be backspaced or deleted. The **F16** or CTRL **E** keys allow you to set the text entry mode as overtype or insert text.

Pop-up entry windows behave in the same way as the main entry window. A pop-up entry window contains entry fields which may use **Display/Select** or **Field Help** windows or require "Yes/No" entries.

To exit a pop-up window press ESC ESC, **F3** or RETURN. You are returned to the screen you are working on.

User Help

You are provided with two levels of on-line help:

- **User Help** - this is displayed at the bottom of the screen and provides summary details of field requirements. As you move through the fields the help text changes to reflect the field that you are positioned in.

- **Field Help** - for each field you are provided with help by pressing **F1**. In some instances the system displays the format of the entry required. For other fields a pop-up window appears that allows you to select an entry.

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Accessing MotorWriter

Accessing MotorWriter

This section describes how to access MotorWriter through Core Back-Office.

Accessing MotorWriter From Core Back-Office

If MotorWriter is integrated into the Core Back-Office system, you can access the MotorWriter quotations options from the *Core Back-Office Client Records & Accounts* menu using the following procedure:

1. Select the 'Client/Policy Details' option from the *Client Records & Accounts* menu. The system displays the **Client/Policy Details** selection screen. You can select an existing client or create a new client policy and policy details before entering MotorWriter.

2. If you want to create a new quotation for an existing or new client access the MotorWriter facility by selecting MotorWriter from the *Links* menu (ESC **Z).**

   *Alternatively, to access and amend an existing clients quotation details press ESC **E** from the relevant policy screen. You cannot generate a new quotation if you use this option.*

MotorWriter Input Screens

The system displays the main **MotorWriter Quotation** screen.

This screen is divided into four areas. Each area is referred to as follows:

- [Proposer details](#) - this allows you to enter details of the proposer and additional drivers if applicable.

- [Vehicle details](#) - this allows you to enter details of the vehicle the proposer wants to insure.

- [Other details](#) - this allows you to enter additional details which affect the premium.

- [Cover details](#) - this screen allows you to enter details of the cover required.

You can access each area by scrolling through them using the TAB key.

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The Main Options Menu

The main MotorWriter functions are accessed from the *Main Options* menu. The functions provided within this menu depend on which version of MotorWriter you are using and whether you used ESC **Z** or ESC **E** to access MotorWriter. You can access this menu in MotorWriter by pressing ESC **F1**.

If you enter MotorWriter using ESC **E** the *Escape Options* menu displayed is shown below.

- Jump to Screen

- Save to BROOMS

- Swap to BROOM(Z)

- Delete Driver

- Exclude Driver

- Include Driver

- Mid-Term Calculator

The *Escape Options* menu (ESC **Z**) menu provides the following options:

- Quotes for selected insurers*

- Quotes for all insurers*

- Workings for any insurer*

- Broker Maintenance

- Toggle Option*

- Save to BROOMS[2]

- Swap To BROOMS (Z)[1,2]

- Load BROOMS Detail[1]

- Clear Quote Details

- Print Quotation / Letter(PC only)

- Jump to Screen[2]

- Accident/Conviction Summary (X)[1]

- Defaults Setup

- Delete Driver*[2]

- Exclude Driver*[2]

- Include Driver*[2]

- Mid-Term Calculator[1]

* These functions can only be used when you have completed the quotation details.
[1] These functions are only available when you are connected to a BROOMS system.
[2] These functions are the only ones available when you access MotorWriter using ESC **E**.

Other Guides

The MotorWriter manual should be used in conjunction with the following set of guides, covering different aspects of the system:

- [Core Back-Office User Manual](#) - this describes how to use the main Core Back-Office system with which MotorWriter is integrated.

- [Brokerlink User Manual](#) - this manual describes how to process proposals arising from quotations generated in MotorWriter.

All these applications are integrated with Core Back-Office which lies at the core of the system.

2: System Maintenance

System Maintenance

This chapter describes how to access and use the functions of the *Broker Maintenance* menu provided with MotorWriter. The *Broker Maintenance* menu provides you with the following facilities:

- Displaying the Open GI newsletter provided with rate updates

- Your Broker Reference

- Setting up of insurer select lists

- Setting up downratings for specific geographical areas by insurer

- Setting up Broker discount/loading of schemes

- Configuring system resources and performance factors

- Printing of the current car code list

- Setting up insurer ratings

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Accessing The Maintenance Menu

To access the *Maintenance* menu from any MotorWriter screen use the following procedure:

1. On the **Quote Details** screen, press ESC **B** or the **Maintenance** button to display the *Maintenance* menu as shown below:

- Broker Reference

- Select Lists

- Area Downratings

- Broker Discounts

- Performance Factor

- Print Car Code List

- Insurer Details

To select an option from the menu use the ARROW keys to move the highlighting bar.

2. When you have highlighted the option that you require press RETURN or click the mouse button.

Alternatively, press the bold letter of the option which you require. For example, to select the 'Select Lists' option press "S".

The 'Broker Reference', 'Select Lists', 'Area Downratings', 'Broker Discounts' and 'Performance Factor' options all have authorisation around them. This can be set up in Broker Amendment.
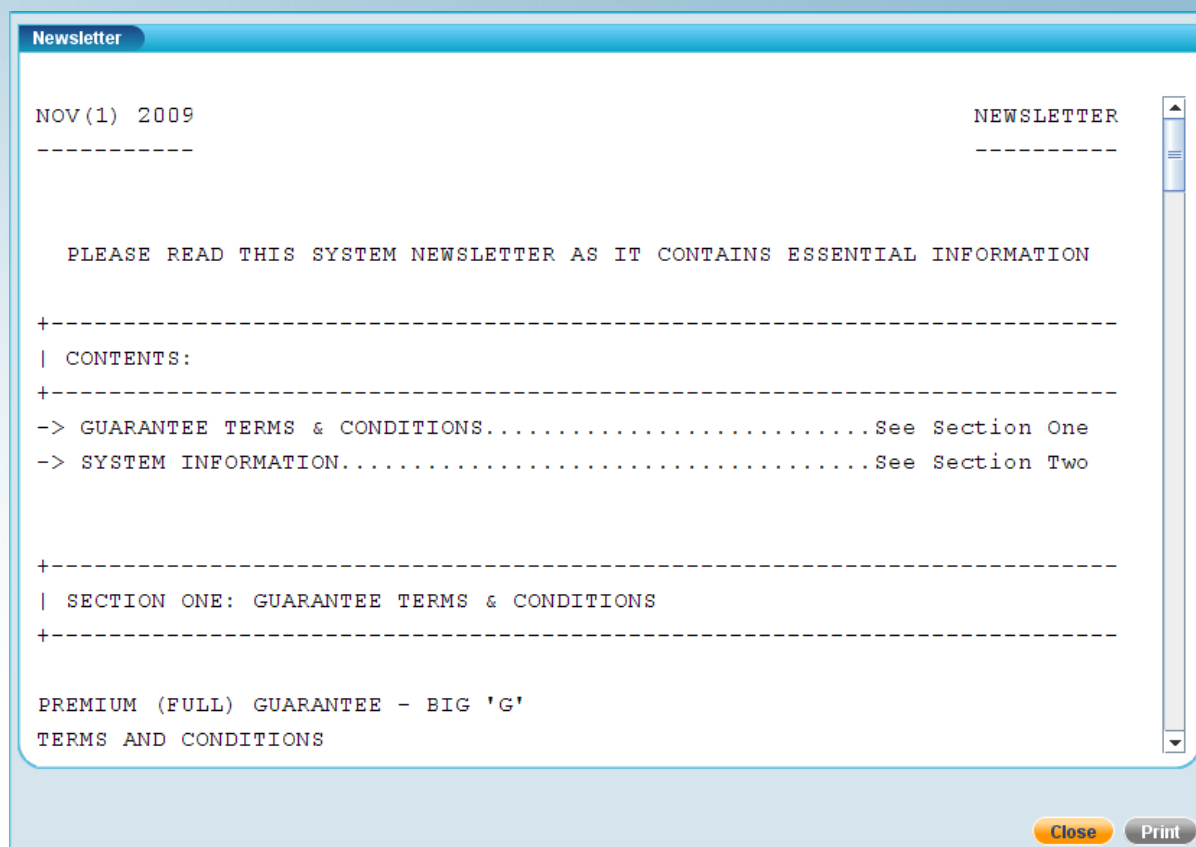
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Displaying The Newsletter

To display the Newsletter press the **Display Newsletter** button (ESC **E)** from either the risk entry screen or the comparative results screen, as circled below:

The Newsletter is then displayed, as shown below:

Click the **Close** button (RETURN) to exit the screen or press the **Print** button (**F7**) to print the newsletter screen.

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Your Broker Reference

Your system has a Broker Reference code. Modifications to this Broker Reference code can only be implemented by Open GI.

To view the Broker Reference code, select the 'Broker Reference' option on the *Maintenance* menu (ESC **B**).

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Maintaining Insurer Select Lists

At any point in time the system maintains two sets of rates for the calculation of quotes, the current month and either the previous month or the next month. When you update rates, usually mid-month, the new rates are installed for the coming month and the previous months rates are erased. An example of this is illustrated below:

Insurer Select Lists Diagram
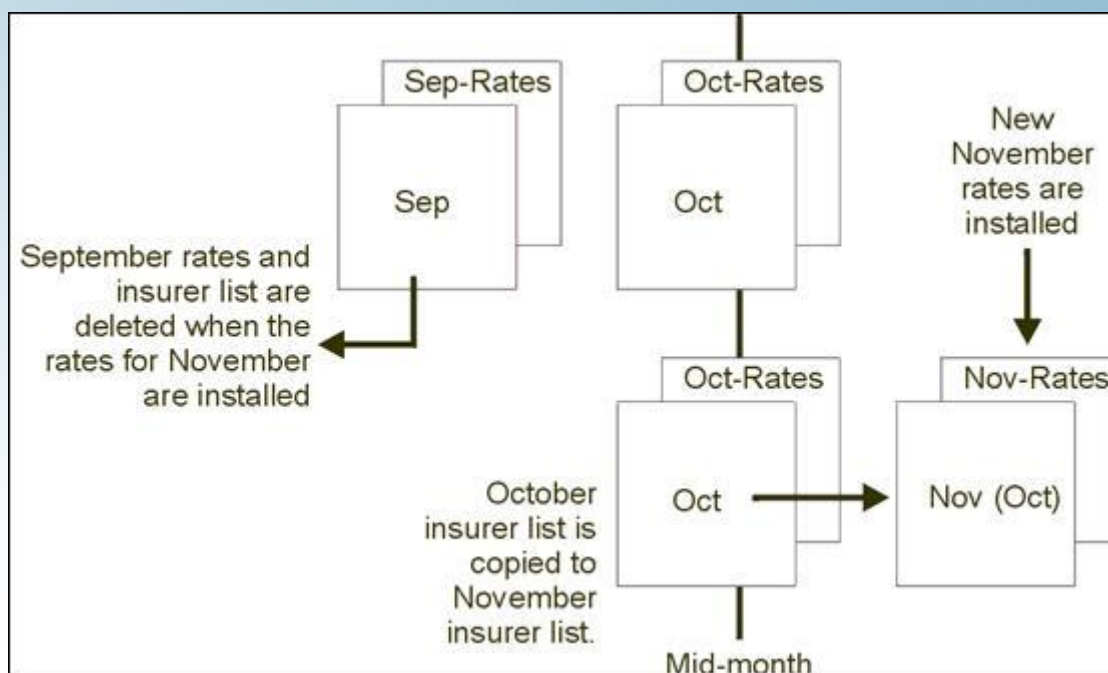
For each set of rates the system allows you to setup five lists of insurers which the system uses to generate quotes.

Insurers have to be added/removed from select lists on both sets of rates. To change to the other select list change the cover date. If the procedure isn't carried out on both sets of rates the settings will be lost when the next rates upgrade is loaded.

You are provided with a complete list of over 400 insurance companies when the system is installed. If you only use certain insurers as a result of discount agreements, EDI arrangements or for specific terms, then you can create a list from the main list. This allows you to identify which insurers the system should use to generate quotes and makes the quotation calculation process much quicker.

Creating A New Insurer Select List

To create an insurer list from the master list use the following procedure when you access the *Maintenance* menu from the *Escape* Options menu or by pressing ESC **B** from the MotorWriter Quotation screen:

1. Select the 'Select Lists' option from the *Maintenance* Menu. The system prompts you to select a list.

2. For a new list enter the number of the list you are creating, 1, 2, 3, 4 or 5. When you have entered the list that you want to create, click the **OK** button (RETURN). The system displays the list of available insurers from the master list:

Select List 1 contains 24 insurers

Code	Scheme	Selected
hPDI	£1 Scheme HPDI	
GBFG	(GBFG)Groupama Forces InsFCEDI	
Ab10	Abc Car 10 Full Cycle EDI	
Ab12	Abc Car 12.5 Full Cycle EDI	Yes
FRSC	AF RSA Drive Comp	
FRST	AF RSA Drive TPFT	
Atse	Ageas Motor Guard 10.0 (atse)	
Ats	Ageas Motor Guard 12.5 (ats)	
FE7	Ageas Motor Guard 7.5 (FE7)	
FGI	Ageas Motor Guard GI (FGI)	
FORI	AgeasMotorGuardInternet (FORI)	
FOSA	AgeasSpecialAcceptances (FOSA)	
AC10	Allianz Clear Private Car 10	
AC12	Allianz Clear Private Car 12.5	

Ok

3. Select the insurer that you want to include in this list using the mouse (ARROW keys). Highlight the insurer's name. To select an insurer click the left mouse button (SPACEBAR).

4. The system adds the word "Yes" next to the selected insurer. To remove an insurer, click the left mouse button (SPACEBAR).

5. When you have completed selecting the required insurers, click the **OK** button (RETURN) and the system returns you to the quotation screen.

> *This procedure will need to be done for both sets of rates currently held on the system. From the **MotorWriter Quotation** screen amend the cover date to select a different months rates and repeat the procedure above.*

Amending An Existing Insurer Select List

To amend an existing list use the following procedure:

1. Select the 'Select Lists' option from the *Maintenance* menu. The system prompts you to select a list.

2. Enter the number of the list you want to amend, 1, 2, 3, 4 or 5. When you have entered the list that you require click the **OK** button (RETURN). The system displays the list of insurers.

3. To select or deselect the insurers that you want to include in this list highlight the insurers name. To select an insurer click the left mouse button (SPACEBAR).

4. To remove an insurer click the left mouse button again (SPACEBAR). To view more insurers use the scrollbar.

5. When you have completed amending the insurer list, click the **OK** button (RETURN) and the system returns you to the quotation screen.

> *This procedure will need to be done for both sets of rates currently held on the system. From the **MotorWriter Quotation** screen amend the cover date to select a different months rates and repeat the procedure above.*

Area Downratings

The system allows you to down rate insurance areas for selected insurers. This affects the calculation of the premium for any proposer living in the specified area. The down rating must be agreed in advance with the insurer concerned before you enter the details on the screen.

To down rate an area or areas use the following procedure:

1. Select the 'Area Down ratings' option from the *Maintenance* menu. The system displays the **Area Down ratings** screen.

2. This screen allows you to down rate a specific area or areas using the following fields:

Insurer	From the list, select the name of the insurer with whom you have agreed the downrating.
Postal Code Range	Select the range of postcodes that you are downrating. The lists contain a complete list of postal areas available.
	For example, to downrate for a range of codes from B1 to B13 select B then, 1 and 13.

	If you are only down rating one area, for example B24, select B then, 24 and 24
Sector Range	You can select the sector codes within an area. If you are downrating a range of areas you do not enter any sector codes. The system defaults are 0 to 9 which includes all sectors. If you are working with only one area then, you can specify specific sectors within the area.
Downrate	Enter the number of areas that you want to down rate by, for example 1.

3. When you have completed a line for the selected insurer you can repeat step 2 for another area with the same insurer or another insurer.

    You can enter up to 15 lines on a screen page and the system provides you with 35 screen pages. To move to another page use the ⬅ ➡ buttons (**F8** and **F9**).

4. When you have completed all the downratings required click the **Save** button (RETURN) to save the changes.

    *Pressing the **Exit** button (ESC ESC) will return you to the **Quotation** screen without saving any changes.*

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Broker Discounts

Broker Discounts

The system allows you to configure up to 52 discount (loading) schemes, where a scheme can discount or load a quotation. A scheme can be applied globally to all insurers or to individual insurers. Any individual scheme can be applied to several insurers with different discounts or loadings for each insurer. This facility is designed to allow you to deal with special interest groups where a discount or loading may apply in addition to the standard policy terms.

Schemes only take effect when you enter a scheme number in the cover screen of the quotation.

If you apply a scheme globally you should not use that scheme again for individual insurers. The system calculates individual insurer schemes first, then, it calculates the effect of the global scheme setting which is applied to all insurers.

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Creating Or Amending Schemes

To create or amend a scheme use the following procedure:

1. Select the 'Broker Discount' option from the *Maintenance* menu. The system displays the **Broker Discounts / Loads** screen.

> *Refer to the section entitled* [Broker Discounts For Irish Brokers](#) *for details on loadings and discounts in Euros.*

You are provided with 52 scheme entries contained on 18 screen pages.

2. To create or amend a scheme for one or all insurers complete the following fields:

Scheme No.	Enter a scheme number from 0 to 99.
After IPT	Select "Yes/No" to indicate whether the effect of the scheme incurs IPT.
All/One	Select "All" or "One" to indicate whether the scheme is to be applied globally or to an individual insurer product. If you enter "One" then you must enter the insurer products name, for example Royal Motorshield.

Load/Discount	Select "Discount" or "Load'" to indicate the effect of the scheme.
Value	Enter the value as pounds or a percentage rate.
£ or %	Select "Pounds" or "Percent" to indicate how the value is to be applied.
Terms 1/2	The system allows you to enter two lines of text to describe the terms of the scheme.

You can now repeat the procedure for another insurer product using the same scheme number or create another scheme. To access **more pages** use the ⊖ ⊖ buttons **(F8 and F9).**

3. When you have completed all the schemes required click the **Save** button (RETURN) to save the changes.

*Pressing the **Exit** button (ESC ESC) will return you to the Quotation screen without saving any changes.*

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Broker Discounts For Irish Brokers

Creating Or Amending Schemes

To create or amend a scheme use the following procedure:

1. Select the 'Broker Discounts' option from the *Maintenance* menu. The system displays the **Broker Discounts/Loads** screen. You are provided with 52 scheme entries contained on 18 screen pages.

2. To create or amend a scheme for one or all insurers complete the following fields:

Scheme No.	Enter a scheme number from 0 to 99.
After IPT	Select "Yes/No" to indicate whether the effect of the scheme incurs IPT.
All/One	Select "All" or "One" to indicate whether the scheme is to be applied globally or to an individual insurer product. If you enter "One"

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	then, you must enter the insurer product name, for example Royal Sun Alliance Select.
Load/Discount	Select "Discount"' or "Load" to indicate the effect of the scheme.
Value	Enter the value as Euros or a percentage rate.
Eu or %	Select "Euros" or "Percent" to indicate how the value is to be applied.
Terms1/2	The system allows you to enter two lines of text to describe the terms of the scheme.

You can now repeat the procedure for another insurer product using the same scheme number or create another scheme. To access more pages use the ⬅️➡️ buttons (**F8** and **F9)**.

3. When you have completed all the schemes required click the **Save** button (RETURN) to save the changes.

*Pressing the **Exit** button (ESC ESC) will return you to the **Quotation** screen without saving any changes.*

Deleting An Existing Scheme

To delete an existing scheme you must clear all the fields in the selected scheme.

*In MotorWriter 68000, to clear the **Scheme No**. field enter 0, the field cannot be cleared otherwise.*

Performance Factor

This option allows you to change the performance of your system by reallocating memory resource. Should you want to amend the performance factor we advise you to contact Open GI.

Changing the performance factor to speed up quotations may have an adverse affect on the performance of other applications such as the word processor.

Printing A Car Code List

The system allows you to print a list of car codes currently on the system. You can print codes for an individual make, for example ROVER, or a complete list of all car codes.

To print a list use the following procedure:

1. Select the 'Print Car Code List' option from the *Maintenance* menu. The system displays the selection window.

2. If you require a list for a specific make, enter the make. You can access the complete list of makes by pressing **F1**, the system displays a **Field Help** window. You can select from the list or use the search facilities.

   To print a complete list of all makes leave the field blank and press RETURN. Providing your printer is connected the list is printed immediately.

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Insurer Details

Press ESC **B** to display the *Maintenance* menu and select the 'Insurer Details' option.

This allows you to enter commission details for any insurer schemes on the system. The monetary amount of commission will then be displayed when quotations are generated.

The monetary commission amount excludes any broker discount or loading and will be calculated as follows:

```
(Quoted Premium excluding IPT and excluding any broker
loadings/discounts) * (Commission Rate / 100)
```

The insurer details facility also allows you to categorise policies according to a preferred method of rating. This is referred to as star rating, for example: all policies which offer the best cover may be rated A, others B, C, etc.

To access the insurer details option use the following procedure:

1. Select the 'Insurer Details' option from the *Maintenance* menu. The system displays the **Star Rating / Commissions** screen.

2. For each insurer you can enter the following:

    Star Rating   This allows you to setup a user configurable rating category for the selected insurer or policy. You can enter any alphanumeric character (a-z, A-Z or 0-9).

    Commission Rate   Enter the amount of commission as a percentage that the insurer offers.

3. To view more insurers use the ⬅ ➡ buttons (**F8** and **F9)**. When you have completed your entries press the **Save** button (RETURN) to save the changes.

> *Pressing the **Cancel** button (ESC ESC) will return you to the **Quotation** screen without saving any changes.*

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3: Vehicle Lookup, Active Quote, Quote Enrichment, Custom Quote

Using Vehicle Lookup, Active Quote, Quote Enrichment, Custom Quote

The Proxy Gateway Settings option allows the switch on and setup for Vehicle Lookup, Active Quote and the Quote Enrichments.

Access the 'Proxy Gateway Settings' option as detailed below:

1. From the *System Control* menu, select the 'System Maintenance' option.

2. Select the 'Proxy Gateway Settings' option. At the bottom of the screen there are the following web configuration options:

   - **Vehicle Lookup** - allows you to edit the vehicle registration lookup URL. The vehicle lookup web service can also be completely turned off if necessary by setting this to "No".

   *Vehicle Lookup has to be explicitly activated by Open GI. It can also be activated at branch level as well as system level, which therefore allows units to now be allocated per branch if necessary. For more information, please contact your Account Manager or the Sales Department on **01905 754455**.*

   - **Active Quote** - activated by Open GI. Select "Yes" to edit the Active Quote web service settings. Refer to the Active Quote guide.

   - **Quote Enrichment** - Open GI has automatically activated each enrichment service on your system.

   For Aviva Quote Enrichment, you will require an agency with them in order to complete the business.

Using Vehicle Lookup, Active Quote, Quote Enrichment, Custom Quote

The following links show you how to use these features:

- Using Vehicle Lookup (UK)

- Using Vehicle Lookup (ROI)

- Using Active Quote

- Using Quote Enrichment Services

- Using Custom Quote (questions captured by Aggregator are also available within the quotation engines for brokers who have contracted for Custom Quote)

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Locate Bookmark

Vehicle Registration Lookup (UK/NI)

Click here for Vehicle Registration Lookup (ROI).

*Vehicle Registration Lookup (UK/NI) has to be explicitly activated by Open GI. It can also be activated at branch level as well as system level, which therefore allows units to now be allocated per branch if necessary. For more information, please contact your Account Manager or the Sales Department on **01905 754455**.*

The Vehicle Look Up web service call is now also available as a frame calculation. Please speak to your account manager if you wish to utilise this functionality.

The Quotation products (excluding HomeWriter) support a web-service-based vehicle lookup feature with a valid registration number.

Vehicle Registration Lookup (UK/NI) has been added to prompt for a vehicle registration (ESC **F**), which then calls an internet service to return the correlating vehicle details to the Writer product so that the vehicle make, model, etc fields can all be automatically populated.

Using The Vehicle Lookup (UK/NI)

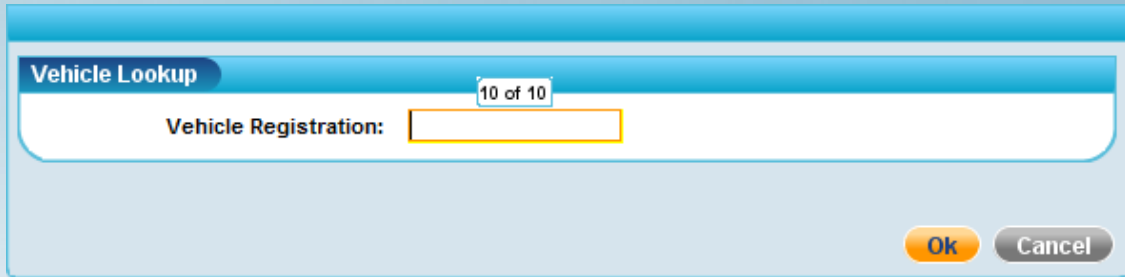1. From within the Writer product, press the **Vehicle Lookup** button (ESC **F).**

2. A window will appear and request the vehicle registration:

3. Enter the registration and press the **OK** button (RETURN).

4. The vehicle registration lookup process will take about 2-3 seconds after which time the pop-up closes and the correlating vehicle details are automatically populated.

There is a default timeout limit of 10 seconds, which is held in the BrokerLink 'Amend Broker Details' option and can be changed if necessary.

The lookup feature is also available for MTA transactions. For example, when vehicle details have changed.

Vehicle Registration Lookup via Frame Calculations (UK/NI)

Please speak to your account manager if you wish to utilise this functionality.

Frame calculations have been added to allow access to the internet DVLA Vehicle Lookup functionality via the vehicular quote engines. This is an advanced calculation and will require enabling on a per machine basis. The frame calculation does not generate this information itself, and for information to be returned to the request, the appropriate releases of the quote engines will be required.

The syntax of the frame calculation operations are as follows:

```
    INIT-VEHICLE-LOOKUP

  <vehicle-lookup variable 1>

  <vehicle-lookup variable 2>

    WRITE-VEHICLE-LOOKUP
```

The <vehicle-lookup variables> are:

Frame Calc Variable	Definition
YCT.Lookup.Reg	The vehicle registration mark
YCT.Lookup.QE	The quote engine to be called: • MW MotorWriter • BW BikeWriter • TW TruckWriter

Successful completion of the function call will be indicated by the value returned in YCT.Lookup.Varchar. The field will be returned empty if the call was successful. Otherwise it will hold the failure reason.

Open-i Motor

Once the individual quote engine releases have been made, the information returned from a valid lookup will have the following content:

Frame Calc Variable	Definition
YCT.Lookup.ABI.Code	ABI Car Code
YCT.Lookup.Car.Code	OGI Car Code
YCT.Lookup.Make	The vehicle manufacturer (e.g. MORRIS)
YCT.Lookup.Model	The vehicle model (e.g. MINOR)
YCT.Lookup.Type	The model type (e.g. TRAVELLER)
YCT.Lookup.Engine.Size	The vehicle's engine capacity
YCT.Lookup.Doors	The vehicle's number of doors
YCT.Lookup.Body.Type	The body type: • Cabriolet • Coupe • Estate • Hatchback • M'Caravan • Pickup • Saloon • Tipper • Van
YCT.Lookup.Fuel.Type	The fuel type: • Diesel • Elec. • LPG • Petrol • Hydrogen
YCT.Lookup.Gears	The gear type:

	• Manual • Automatic
YCT.Lookup.Manf.Year	The vehicle's year of manufacture. The Carweb database does not have a year of manufacture for every single vehicle. If no year is found, MW looks into vehicle makes file within the rates and will use the earliest year of manufacture it has for that vehicle.
YCT.Lookup.Varchar	Field used to indicate success or failure of the call: • Success – returned empty • Failure – contains failure reason

(Open-i Motor) Open GI

Vehicle Registration Lookup (ROI)

Click here for Vehicle Registration Lookup (UK/NI).

*This feature has to be explicitly activated by Open GI. It can also be activated at branch level as well as system level, which therefore allows units to now be allocated per branch if necessary. For more information, please contact your Account Manager or the Sales Department on **01905 754455***.

The Vehicle Look Up web service call is now also available as a frame calculation. Please speak to your account manager if you wish to utilise this functionality.

The Motor and Truck ROI Quotation products support a web-service-based vehicle lookup feature with a valid registration number.

Vehicle Registration Lookup has been added to prompt for a vehicle registration (ESC **F**), which then calls an internet service to return the correlating vehicle details to MotorWriter or TruckWriter so that the vehicle make, model, etc fields can all be automatically populated.

Using The Vehicle Lookup (ROI)

1. From within the Writer product, press the **Vehicle Lookup** button (ESC **F**)**.**

2. A window will appear and request the vehicle registration:

3. Enter the registration and press the **OK** button (RETURN).

4. The lookup process will take about 2-3 seconds. One of the following will happen:

    - If an explicit registration match is returned, the pop-up closes and the correlating vehicle details are automatically populated.

    - If an explicit registration match cannot be returned by Carweb they will return the ABI Vehicle code of their "best guess" vehicle. The ABI Vehicle code returned will be looked up in the rates (Guide table) in order to extract the full vehicle details for that vehicle, as shown below:

5. The "best guess" vehicle can be selected by pressing the **Use Best Guess** button (RETURN) or you can click the **Disregard Best Guess** button (ESC ESC) to manually select the vehicle details.

---

*There is a default timeout limit of 10 seconds, which is held in the BrokerLink '**Amend Broker Details**' option and can be changed if necessary.*

The lookup feature is also available for MTA transactions. For example, when vehicle details have changed.

Vehicle Registration Lookup via Frame Calculations (ROI)

Please speak to your account manager if you wish to utilise this functionality.

Frame calculations have been added to allow access to the internet Vehicle Lookup functionality via the vehicular quote engines. This is an advanced calculation and will require enabling on a per machine basis. The frame calculation does not generate this information itself, and for information to be returned to the request, the appropriate releases of the quote engines will be required.

The syntax of the frame calculation operations are as follows:

```
    INIT-VEHICLE-LOOKUP

  <vehicle-lookup variable 1>

  <vehicle-lookup variable 2>

    WRITE-VEHICLE-LOOKUP
```

The <vehicle-lookup variables> are:

Frame Calc Variable	Definition
YCT.Lookup.Reg	The vehicle registration mark
YCT.Lookup.QE	The quote engine to be called: • MW MotorWriter • TW TruckWriter

Successful completion of the function call will be indicated by the value returned in YCT.Lookup.Varchar. The field will be returned empty if the call was successful. Otherwise it will hold the failure reason.

Once the individual quote engine releases have been made, the information returned from a valid lookup will have the following content:

Frame Calc Variable	Definition
YCT.Lookup.ABI.Code	ABI Car Code
YCT.Lookup.Car.Code	OGI Car Code
YCT.Lookup.Make	The vehicle manufacturer (e.g. MORRIS)
YCT.Lookup.Model	The vehicle model (e.g. MINOR)
YCT.Lookup.Type	The model type (e.g. TRAVELLER)
YCT.Lookup.Engine.Size	The vehicle's engine capacity
YCT.Lookup.Doors	The vehicle's number of doors
YCT.Lookup.Body.Type	The body type: • Cabriolet • Coupe • Estate • Hatchback • M'Caravan • Pickup • Saloon

	• Tipper
	• Van
YCT.Lookup.Fuel.Type	The fuel type: • Diesel • Elec. • LPG • Petrol • Hydrogen
YCT.Lookup.Gears	The gear type: • Manual • Automatic
YCT.Lookup.Manf.Year	The vehicle's year of manufacture. The Carweb database does not have a year of manufacture for every single vehicle. If no year is found, MW looks into vehicle makes file within the rates and will use the earliest year of manufacture it has for that vehicle.
YCT.Lookup.Varchar	Field used to indicate success or failure of the call: • Success – returned empty • Failure – contains failure reason
YCT.Lookup.best.guess	If ROI Vehicle Registration lookup = "Best Guess" then the flag is set to "Yes", otherwise leave empty signifying an explicit match..

Quote Enrichment Services

Quote Enrichment Services

Quote Enrichment Services enable brokers to provide more competitive, real-time rates to clients. This can be based on additional quote enrichment data such as credit history, postcode rating and other more specific personal data. The Open GI quote engine make a web service call to the insurer's rating engine and quotes are returned in real-time.

Please note that, in terms of hardware, you must have an MLS server connected to the internet in order for the quote enrichment web service(s) to work.

• [Aviva Quote Enrichment](#) returns additional 'enrichment' data relating to the client and vehicle (Dynamic Pricing). The Aviva service is only called if the mandatory fields that Aviva require to be populated are populated and also if the Aviva schemes are included in the generated quotation.

- [Full Postcode Rating](#) automatically acquires the full postcode rating details (taking generally less than 2 seconds) for the vehicle-overnight postcode and proposer's residency postcode and if successful, they will supersede the postcode rating details in the local MotorWriter rates. There are no additional mandatory questions for Full Postcode Rating.

- [Informed Quotes](#) (Insurance Initiatives Ltd (IIL)) helps to combat fraud and facilitates more competitive pricing for personal lines insurers. The IIL service is only called if the mandatory fields that IIL require to be populated are populated and also if the IIL schemes are included in the generated quotation.

- [LexisNexis Motor Enrichment](#) returns real-time data feeds and scoring models to reduce fraud and improve pricing. The LexisNexis service is only called if the mandatory fields that LexisNexis require to be populated are populated and also if the LexisNexis schemes are included in the generated quotation.

- [IHP Markerstudy](#) (Insurer Hosted Pricing)* allows insurers to wholly define their rating rules in a hosted environment, which is then called by MotorWriter in real time at the point of quoting. If a scheme supports IHP, then the premium, excesses, endorsements, class of use and premium break down are all provided from the insurer and not from the Open GI rating.

- [MyLicence](#) allows insurers the ability to rate on DVLA data held against a driver's licence to help combat fraud (it is not used to update / refresh any of the self-declared details that may have been typed into MotorWriter/Brokerlink)

* Also known Insurer Hosted Rating (IHR).

Quote Enrichment Services Summary

Enrichment Type	Country	Question Set Validation Extended?	Service called at New Business?	Service Called At Mid Term Adjustment?
Aviva Quote Enrichment	UK/NI	Yes	Yes	Yes
FPR (Full Postcode Rating)	UK/NI	No	Yes	Yes
IIL (Informed Quotes)	UK/NI	Yes	Yes	No
LexisNexis	UK/NI	Yes	Yes	Yes
Insurer Hosted Pricing (IHP)	UK/NI	Yes	Yes	Yes
MyLicence	UK	Yes	Yes	Yes* (* permanent Mid Term adjustments for new drivers only)

Some schemes do support more than one form of enrichment, which is typically IIL and FPR.

Quote Enrichment services are not called at renewal.

Refer to the Consent for Searches - A Brief Explanation page.

(Open-i Motor) Open GI

Consent for Searches - A Brief Explanation

The very first form of quote enrichment supported by Open GI was the Aviva quote enrichment service, which was released in 2010. This Aviva enrichment service had the capacity to check various public databases as well as private databases and also to perform a soft credit search. In order for this to be legal, the integration of their service into MotorWriter meant that a new question had to be added to ask permission for the private searches and credit searches to be performed by the Aviva service. This is shown below:

As there is no space on the main MotorWriter Quotation screen (the four panelled display) to show all the wording and the field, it has to be accessed by answering 'Yes' to a trigger question, which is the **Searches Consent** field shown below:

It is important to realise that this trigger question is **not** the consent question – it is just a trigger field, like any other trigger field in MotorWriter, to gain access to the **Consent for Searches** pop-up.

Open GI also integrates with Informed Quotes from IIL, and as this also performs searches, then the **Consent for Searches** question becomes relevant too.

As a rule, if a third party enrichment service supports any form of searching, then it is the **Consent for Searches** question that fully controls the level of searching (public and/or private and/or credit rating) that these third party enrichment services will be allowed to perform on the customer:

Consent for Searches Answer	Search/Searches that the third Party Enrichment Service Is Allowed to Perform
Yes *	All the searches supported by the enrichment service.
No **	Only the public searches supported by the enrichment service.
Empty (not answered) ***	No searches are performed: third party web services will not be called by MotorWriter.

* Gives the best chance of generating the best / accurate / competitive price for the scheme(s).

** As you have answered "No", there will be no private searches / credit search (for example, Aviva). Therefore the best price may not be obtained from the insurer whose schemes support the enrichment service. The following message on the quotation screen will highlight this:
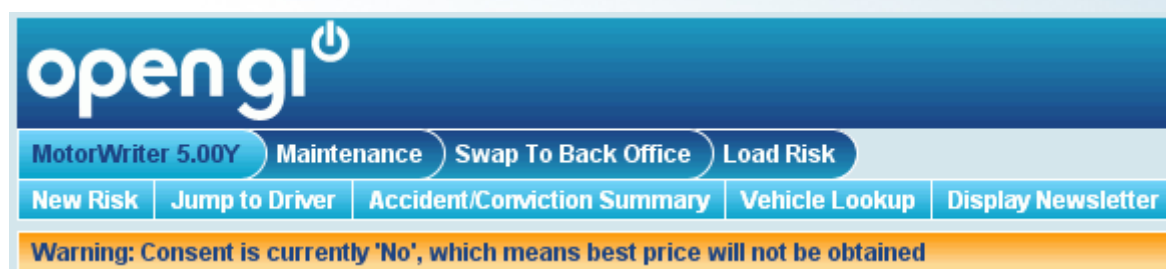
*** High risk that the relevant scheme(s) will give a no-quote/refuse (for example, Aviva)

The **Searches Consent>** trigger field (and therefore the underlying **Consent for Searches** pop-up) will only appear in MotorWriter if any third party enrichment service has been activated on your back office system (this is typically done by Open GI and you will get a system notice as part of this listing all the insurer schemes that support that particular enrichment service).

(Open-i Motor) Open GI

Aviva Quote Enrichment

The Proxy Gateway Settings option allows you to switch on the Quote Enrichment Service.

You will require an agency with Aviva in order to complete the business.

Aviva Quote Enrichment returns additional 'enrichment' data relating to the client and vehicle (Dynamic Pricing). The Aviva service is only called if the mandatory fields that Aviva require to be populated are populated and also if the Aviva schemes are included in the generated quotation.

Key Points For Aviva Quote Enrichment

- The Consent for Searches field is mandatory

- The proposer name and address and any additional driver names are mandatory

- MTAs will result in a call to the Aviva enrichment service.

The **Consent for Searches** question in relation to the Aviva enrichment service is detailed below:

- If you answer "Yes" to the Searches Consent trigger question, then the underlying pop-up will display with the full Consent for Searches question, which can then be answered "Yes" or "No". This essentially guarantees that MotorWriter will call the Aviva web service when invoking a comparative quote (assuming Aviva quote enrichment has been activated).

- If you answer "No" to the Searches Consent trigger question, then this means the underlying pop-up with the full Consent for Searches question is not shown and therefore not answered. As a direct consequence of this, the Aviva web service will not be called and so the Aviva scheme will all refuse quote.

You can now refer to the Continuing With Quote Enrichment page if required.

(Open-i Motor) Open GI

Full Postcode Rating

The Proxy Gateway Settings option allows you to switch on the Quote Enrichment Service.

MotorWriter will automatically acquire the full postcode rating details for the vehicle-overnight postcode and proposer's residency postcode and if successful, they will supersede the postcode rating details in the local MotorWriter rates.

If a postcode's rating is not in the Full Postcode Rating file, then no Full Postcode Rating will be available to the quote logic and it will be up to the insurer whether they refuse the quote or not. In this situation, the local postcode rating will not be used.

Key Points For Full Postcode Rating Quote Enrichment

- There are no additional rating questions and no additional screens added into MotorWriter to support this particular enrichment service.

- The Full Postcode Rating service does NOT have any relationship with the issue of consent (Consent for Searches)

(Open-i Motor) Open GI

Informed Quotes Enrichment (Insurance Initiatives Ltd)

The Proxy Gateway Settings option allows you to switch on the Quote Enrichment Service.

Informed Quotes (Insurance Initiatives Ltd (IIL)) helps to combat fraud and facilitates more competitive pricing for personal lines insurers. The IIL service is only called if the mandatory fields that IIL require to be populated are indeed populated and also if the IIL schemes are included in the generated quotation.

MotorWriter can automatically acquire the 'Informed Quotes' enrichment data whenever a single or comparative quote is invoked, which will then be fed into the insurer's underwriting rules.

Key Points For Informed Quotes Quote Enrichment

- The proposer name and address and any additional driver names are mandatory

- The Consent for Searches field (mandatory to trigger call IIL enrichment service)

- At Mid Term Adjustment, there is no call to the IIL web service. The enrichment data from New Business is used.

The **Consent for Searches** question shown below is relevant to the 'Informed Quotes' enrichment service from IIL (Insurance Initiatives Ltd), as detailed below:

- If the Consent for Searches question is answered "Yes" or "No", then this guarantees that MotorWriter will call the 'Informed Quotes' web service when invoking a comparative quote.

    This is because it implies the customer has been made aware that searches will be made on them. i.e. the screen has been displayed and the question answered.

- If you answer "No" to the Searches Consent trigger question, then this means the underlying pop-up with the full Consent for Searches question is not shown and therefore not answered. As a direct consequence of this, the comparative quote will not call the 'Informed Quotes' enrichment service and so no enrichment data will be directly supplied from the 'Informed Quotes' enrichment service.

    However, insurers have a requirement to know when this particular scenario occurs (the Consent for Searches is unanswered and therefore the 'Informed Quotes' web service is not called) and may or may not apply specific rating for this situation.

    In order to support this scenario, an alternative static enrichment result is produced by MotorWriter itself, which the insurer ratings will then be able to recognise and rate accordingly. If this particular scenario was not flagged to the insurer rating, then it would be the same as if 'Informed Quotes' was physically deactivated on your MLS - insurers have a requirement to be able to distinguish.

You can now refer to the Continuing With Quote Enrichment page if required.

(Open-i Motor) Open GI

LexisNexis Quote Enrichment

The Proxy Gateway Settings option allows you to switch on the Quote Enrichment Service.

LexisNexis help to combat fraud and facilitates more competitive pricing for personal lines Motor insurance. The LexisNexis service is only called if the mandatory fields that LexisNexis require to be populated are indeed populated and also if the LexisNexis schemes are included in the generated quotation.

MotorWriter can automatically acquire the LexisNexis enrichment data whenever a single or comparative quote is invoked, which will then be fed into the insurer's underwriting rules.

Key Points For Informed Quotes Quote Enrichment

- The proposer name and address and any additional driver names are mandatory

- The Consent for Searches field (mandatory to trigger call LexisNexis enrichment service)

- At Mid Term Adjustment, there is a call to the LexisNexis web service.

The **Consent for Searches** question shown below is relevant to the quote enrichment service from LexisNexis, as detailed below:

- If the Consent for Searches question is answered "Yes" or "No", then this guarantees that MotorWriter will call the LexisNexis web service when invoking a comparative quote.

     This is because it implies the customer has been made aware that searches will be made on them. i.e. the screen has been displayed and the question answered.

- If you answer "No" to the Searches Consent trigger question, then this means the underlying pop-up with the full Consent for Searches question is not shown and therefore not answered. As a direct consequence of this, the comparative quote will not call the LexisNexis enrichment service and so no enrichment data will be directly supplied from the LexisNexis enrichment service.

     However, insurers have a requirement to know when this particular scenario occurs (the Consent for Searches is unanswered and therefore the LexisNexis web service is not called) and may or may not apply specific rating for this situation.

     In order to support this scenario, an alternative static enrichment result is produced by MotorWriter itself, which the insurer ratings will then be able to recognise and rate accordingly. If this particular scenario was not flagged to the insurer rating, then it would be the same as if LexisNexis was physically deactivated on your MLS - insurers have a requirement to be able to distinguish.

You can now refer to the Continuing With Quote Enrichment page if required.

(Open-i Motor) Open GI

Insurer Hosted Pricing (IHP)

The Proxy Gateway Settings option allows you to switch on the Quote Enrichment Service.

Insurer Hosted Pricing (IHP)* allows insurers to wholly define their rating rules in a hosted environment, which is then called by MotorWriter in real time at the point of quoting. If a scheme supports IHP, then the premium, excesses, endorsements, class of use and premium break down are all provided from the insurer and not from the Open GI rating.

* Also known Insurer Hosted Rating (IHR).

Key Points For Insurer Hosted Pricing (IHP) Quote Enrichment

- The proposer name and address and any additional driver names are mandatory

- The Consent for Searches field (mandatory to trigger call IHP enrichment service)

- MTAs will result in a call to the Insurer Hosted Pricing (IHP) enrichment service.

The **Consent for Searches** question shown below is relevant to the Insurer Hosted Pricing enrichment service from IHP, as detailed below:

- If the Consent for Searches question is answered "Yes" or "No", then this guarantees that MotorWriter will call the 'Insurer Hosted Pricing' web service when invoking a comparative quote.

  This is because it implies the customer has been made aware that searches will be made on them. i.e. the screen has been displayed and the question answered.

- If you answer "No" to the Searches Consent trigger question, then this means the underlying pop-up with the full Consent for Searches question is not shown and therefore not answered. As a direct consequence of this, the comparative quote will not call the 'Insurer Hosted Pricing' enrichment service and so no enrichment data will be directly supplied from the Insurer Hosted Pricing (IHP) enrichment service.

  However, insurers have a requirement to know when this particular scenario occurs (the Consent for Searches is unanswered and therefore the 'Insurer Hosted Pricing' web service is not called) and may or may not apply specific rating for this situation.

  In order to support this scenario, an alternative static enrichment result is produced by MotorWriter itself, which the insurer ratings will then be able to recognise and rate accordingly. If this particular scenario was not flagged to the insurer rating, then it would be the same as if Insurer Hosted Pricing (IHP) was physically deactivated on your MLS - insurers have a requirement to be able to distinguish.

You can now refer to the Continuing With Quote Enrichment page if required.

(Open-i Motor) Open GI

MyLicence

MyLicence

The MyLicence Quote Enrichment Service is activated by Open GI in the Proxy Gateway Settings.

MyLicence is as an 'enrichment' at New Business quotation or during a permanent Mid Term adjustment **for new drivers only**.

MyLicence allows insurers to gain access to rate DVLA data held against a driver's licence to help combat fraud (it is not used to update / refresh any of the self-declared details that may have been typed into MotorWriter/Brokerlink).

Due to sensitivity of the DVLA data, it is never shown on screen and there will be no reference in the workings to the DVLA data. If an Insurer scheme uses MyLicence, the Quote workings are restricted.

*A call is only made if the Driving Licence Number is valid AND the driver has answered "Yes" to the **MyLicence Consent** dialog.*

Purging Of Data

As the data returned is of sensitive nature, the MyLicence data will be purged:

- After it expires - this is after 30 days for prospects

- After 1 year or when the quote expires.

Key Points For MyLicence

- A valid UK driving licence number of 16 characters must be entered. If some drivers have valid driving licence numbers but not others, then an enrichment call will be made but only for the drivers with a valid licence number.

- If an invalid Driving licence number is entered or the Driving Licence number field is left blank then the MyLicence data for that driver will not be requested and the risk will rate on the entered conviction details.

- If no response is received back from the MyLicence database, schemes supporting the enrichment will have the option to use the locally held conviction data for rating purposes.

- The licence held must be one of the following: **Full**, **Provisional**, **Rest'd 3 + yrs**, **Rest'd < 3 yrs**, **Disqualified**

- The **Consent for MyLicence** dialog must be answered "Yes" although the service does NOT have any relationship with the issue of consent (Consent for Searches) The current **Consent for Searches** question cannot be used, because:

  - MyLicence consent has to be driver level

  - The DVLA have strict rules on the consent wording for the MyLicence Consent question and is totally different to the standard consent for searches question

  - MyLicence consent wording differs between proposer and additional drivers

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The Consent for MyLicence Dialog - New Business (Proposer)

A valid licence number must be entered under the Personal Details section of the Quotation screen:

When a quotation is produced, for the **Proposer** the following **Consent for MyLicence** dialog is displayed:
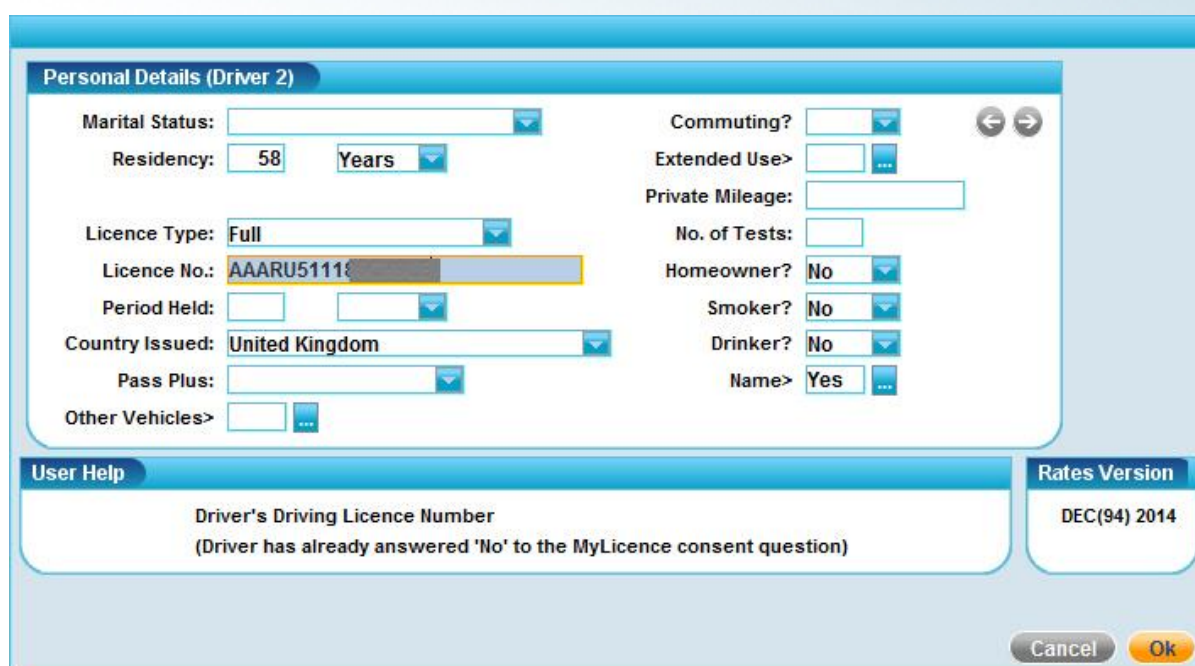
The licence number for the Proposer is stored on the PC Frame.

The Consent for MyLicence Dialog - New Business (Additional Driver)

A valid licence number must be entered for each additional driver under the Personal Details section of the Quotation screen:

For each **additional driver** the following **Consent for MyLicence** dialog is displayed:

The licence numbers for any additional drivers is stored on PC3 Frame(s).

Using The Consent For MyLicence Dialog - New Business

The **Consent for MyLicence** screen will be displayed per driver who has a valid licence number entered:

- The default answer is "Yes" to the **Consent for MyLicence** trigger question. Click the **OK** button (RETURN) to confirm this and MotorWriter will call the MyLicence web service when invoking a comparative quote. The following wordings will be shown and printed in the quotation workings:

    - **When the MyLicence scheme has quoted a premium** - "*This quotation has been calculated by the Insurer using external data sources. In the event you need to query the quotation or price quoted, please refer the risk to the Insurer*".

    - **When the MyLicence scheme has declined** - "*This risk is no longer eligible for cover under this Insurance product; please find an alternative Insurance Product*".

- If you answer "No" or blank to the **Consent for MyLicence** trigger question, then the MyLicence web service will not be called and default rating is used.

The Consent for MyLicence Dialog - Mid Term Adjustment

The **Consent for MyLicence** screen will only be displayed at Mid Term Adjustment when a new driver with a valid licence number has been added:

Refer to the Add Driver page in the BrokerLink guide.

(Open-i Motor) Open GI

The Consent For Searches Question Explained

Validation Of The Consent For Searches Question (Open-I MotorWriter 5.00Y - April 2013 onwards)

Please also refer to the Consent for Searches - A Brief Explanation page for further information.

The validation built into MotorWriter has been enhanced (MotorWriter 5.00Y onwards) to encourage, as a minimum, that the **Consent for Searches** question is answered with either a "Yes" or a "No".

This will in turn result in as many enrichment services being called as possible as part of any quote request and so giving the insurer schemes the better chance of quoting a competitive premium. Please note that it is still possible to leave the **Consent for Searches** field empty if there is a need to opt out of any third party enrichment service from being called from MotorWriter.

The **Consent For Searches question** will now behave as follows when invoking a quote:

Scenario 1: New Risk – Keyed In From Scratch Or A Default Is Loaded

If the **Searches Consent>** is empty (blank) then:

1. The **Searches Consent>** is automatically set to "Yes".

2. The **Consent for Searches** pop-up automatically displays.

3. The **Consent for Searches** question is automatically populated with "Yes".

4. You can click the **OK** button (RETURN) to confirm or change it to a "No" and then click the **OK** button (RETURN).

5. You can then re-invoke the comparative quote request.

Scenario 2: New Risk – A Default is Loaded (where Consent for Searches has been set as "Yes" or "No")

If the **Searches Consent>** field is "Yes" and the **Consent for Searches** is "Yes" or "No", then:

1. The **Consent for Searches** pop-up is automatically displayed.

2. You can click the **OK** button (RETURN) to confirm or change it and then click the **OK** button (RETURN).

3. You can then re-invoke the comparative quote request.

Scenario 3: Loading An Existing Risk - Consent for Searches Unanswered

When loading Into Advanced Prospect Management or Core Back-Office (ESC **L**), the behaviour is Identical to that detailed Scenario 1.

Scenario 4: Loading An Existing Risk - Consent for Searches Answered

When loading Into Advanced Prospect Management or Core Back-Office (ESC **L**). the current answer is honoured and you are not re-prompted.

Scenario 5: Searches Consent> Is Set To "No"

You have explicitly set the **Searches Consent** trigger question to "No", which leaves the **Consent for Searches** field as empty. This is honoured and you are not re-prompted.

*For all 5 scenarios, if the **Searches Consent>** field is subsequently cleared, then the behaviour will be as detailed in Scenario 1.*

Continuing With Quote Enrichment

1. Once all the mandatory Motor risk details have been provided, the **Quotation Screen** is then displayed:

2. To generate a set of quotations once you have entered all the necessary details, you can use one of the following options:

   • Press ESC **W** to generate a single insurer quotation and examine the workings. You cannot save the details to Core Back-Office from within this option or print a quotation.

   • Press the **Quote Selected** button (ESC **Q** or RETURN) to select one of the insurer lists

   • Press the **Quote All** button (ESC **A**) if you want to generate quotations for all the insurers.

3. The quote process with Quote Enrichment will now take place. You can now refer to The Quote Process with Quote Enrichment page.

(Open-i Motor) Open GI

Locate Bookmark

The Quote Process with Quote Enrichment

When you invoke a quotation, there are a number of checks that Motor will perform in connection with the quote enrichment mechanism, which may result in a dialog appearing.

The checks that take place are detailed below, along with the potential outcomes:

Quoted With An Enrichment Response:

If all the validation has passed, then the enrichment request will be generated and posted off to the relevant enrichment services.

The following message is displayed:
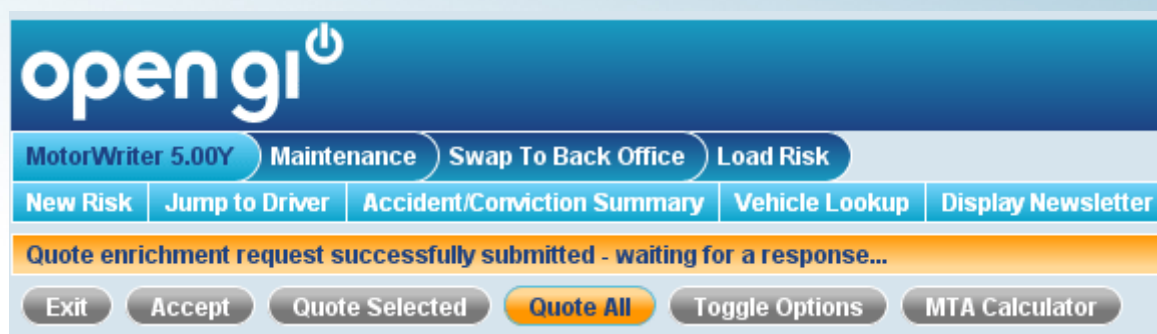
As soon as all the responses from all the enrichment services have been received, then the local rating is executed which will pick up an relevant enrichment data in order to help generate the premiums. The quote continues as normal with the enrichment response details applied to the relevant scheme(s) rating rules:
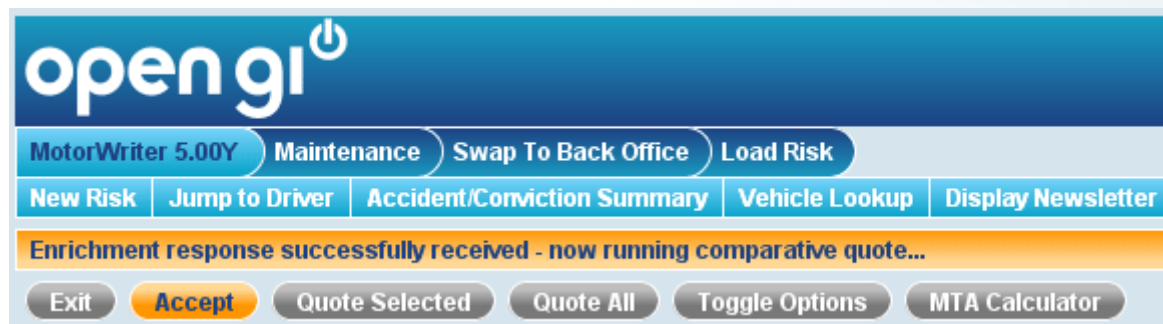
A message is displayed confirming the quote enrichment has taken place, as shown below:

An "E" against a scheme on the results screen denotes that the scheme has been enriched. However, you can press ESC 0 (Zero) on a scheme to see a summary of what enrichment(s) have applied.

If the quotation is saved, the **Consent for Searches** field is saved on the CF Frame and a ERM risk level frame generated for each form of enrichment that applied to the scheme.

Quote Enrichment - (New Business/Rebroke) Dialog:

If no enrichment response has been detected after the timeout period, a **Quote Enrichment - (New Business/Rebroke)** dialog will be displayed:

Wait For A Response Until Timeout

This option allows you to wait again for a response to come back if you want to. If you select the **Wait For A Response Until Timeout** button, the following dialog is displayed:
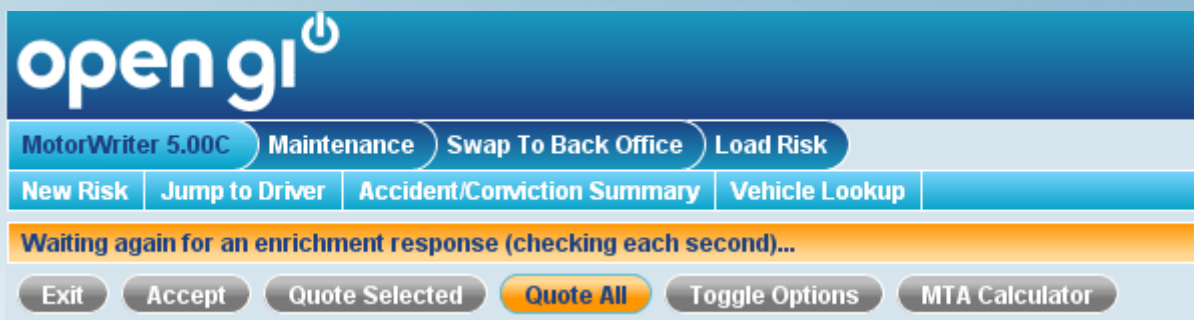
The timeout value used here comes from the '**Amend Broker Details**' option on the *Brokerlink Control/Maintenance* menu.

Quote Without the Enrichment Response

If you click the **Quote Without the Enrichment Response** button then the quote carries on without the enrichment details available. They will be ignored for this particular quote run.

In this instance, the scheme which requires the enrichment response may not quote.

If the response then comes back later on and another quote run is invoked, then the response will be used (assuming none of the quote enrichment fields have been amended - this would incur a brand new request and any previous requests/responses would be ignored).

Exit Quote Run & Try Again Later

If you click the **Exit Quote Run & Try Again Later** button, the main MotorWriter four panelled risk screen is displayed.

Quote Enrichment - Change In Risk Details Detected Dialog:

Once an enrichment request has been made from the enrichment screens, if any changes in vehicle, name, cover date, address, post code and garaging post code are subsequently made, the following message is displayed when you repeat the quote:
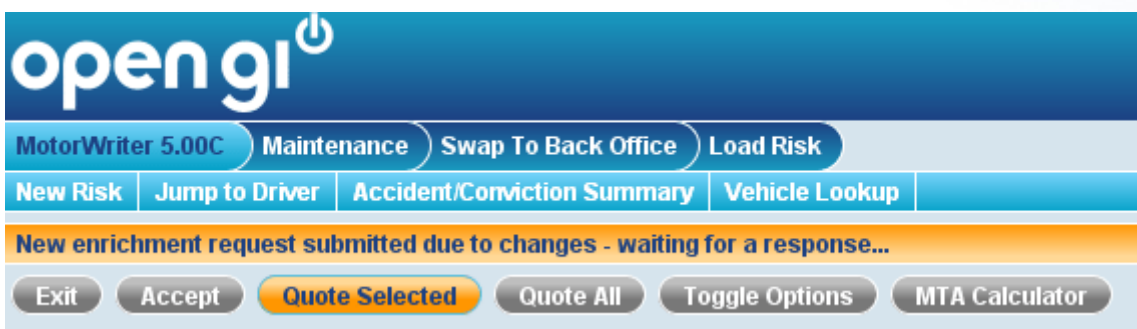
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Locate Bookmark

Viewing Quote Enrichment Scheme Information

You can review the status of any available quote enrichment supported by a scheme by using ESC **0** (Zero) as follows:

View Supported Enrichment Services

The following examples show if a scheme has been enriched:

A Scheme With Enrichment

If a scheme has been enriched, indicated by the "E", the following is displayed when ESC **0** (Zero) is pressed:

The above screen shot shows that **Aviva Quote Enrichment**, **Full Postcode Rating** and **Informed Quotes** are supported on your system. **Full Postcode Rating** and **Informed Quotes** are supported by the scheme and both have been successfully applied.

In the example below, **LexisNexis (LXNX)** has been applied:

A Scheme Without Enrichment

If the scheme hasn't been enriched, the following is displayed when ESC **0** (Zero) is pressed, as highlighted below:

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Locate Bookmark

The CF Frame

The **CF** Frame with the **Consent for Searches** field highlighted is displayed below:

This field shows whether or not the client has agreed to private searches as part of the quote enrichment process.

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Quote Enrichment Back-Office Frame (ERM)

Each form of enrichment that has applied to a scheme is represented by an ERM (Enrichment for Motor) risk level frame. If the risk is saved back to Advanced Prospect Management or the Core Back-Office, it is appended to the standard MotorWriter frames.

The ERM frame cannot be updated.

The example below shows that **Full Postcode Rating** has been applied:

In the example below, **Informed Quotes** and **Full Postcode Rating** have been applied, and an ERM frame created for each one:

Click here for the ERM frame keywords.

4: Entering Quotation Details

Entering Quotation Details

This chapter describes how to complete the main quotation screen and the ancillary windows associated with a quotation. All the quotation screens adhere to ABI requirements. The main quotation screen is divided into the following four windows:

- Vehicle Details - this allows you to enter details relating to the vehicle

- Other Details - this allows you to enter additional details (including custom quote and additional Aggregator Question if enabled)

- Proposer Details - this allows you to enter details relating to the proposer of the vehicle

- Cover Details - this allows you to enter details relating to the insurance cover

The system includes the following additional windows which depend on the field entries in the main quotation screens:

- additional drivers - you are provided with additional driver screens for up to 4 named drivers, if you specify any or named drivers as an option.

- accident details - you are provided with accident detail screens for the proposer and any other drivers on the policy or previous policy.

- conviction details - you are provided with a conviction detail screen for the proposer and any named driver. This screen appears automatically if a driver indicates previous convictions.

- illness/disability details - you are provided with a disability detail screen which appears automatically if a driver indicates any illness or disability.

The following sections detail the options available for each field on a screen. Not all fields are mandatory and the system makes certain assumptions (referred to as defaults) if you do not enter any information.

Different Broker procedures demand different information to generate a quote. We describe how to complete every field, you can, however, generate quotations by only completing some of the fields. Which fields you need to complete depends on your company procedures and how your system has been configured. Certain fields already contain default entries when you start a quotation. You can change these entries if required.

Many entry fields allow you to call up a list of entries from which you can make a selection. To access the list, click on the drop down list for a specific field (**F1**).

Data lists contain bolder characters, these indicate the short codes that you can enter to select the data directly from the field, for example for Computer Services you could enter CPSV in the relevant field and the system would automatically update the field text to Computer Services. If you cannot remember the codes you must use the following procedure:

- use the mouse (ARROW keys) to highlight the item on the list that you require, and click the left mouse button (RETURN). The selected text is entered in the field.

- if the item is not displayed you can use the scrollbar (**F8** and **F8)** to move through the list.

Alternatively, in long lists, such as countries, you can press the first letter of the item required to display the alphabetic section containing that item, for example, to access the United Kingdom, press "U", the system places the highlight over the first country beginning with "U". Then, use the ARROW keys to select United Kingdom.

The system also provides you with a string search facility described in the section Search Facility.

*To exit a popup window press the **Cancel** button (ESC ESC). You are returned to the screen you are working on.*

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Entering Vehicle Details

Entering Vehicle Details

This section describes how to complete the vehicle details as shown below. This is the first window that you are required to complete in order to generate a quote. This window contains the details of the car that the proposer wants to insure. The entries supplied by the system utilise the full ABI vehicle list details.

You may not be required to complete all the fields. The more detail you enter, the more accurate the quote.

Make	Enter the make of the car, for example, CITROEN, ROVER. Use the drop down list to obtain a list of available entries.
Model	Enter the model of the car. Use the drop down list to display all the available models for the make that you entered.
Capacity	Enter the engine capacity in cubic centimetres, for example, 1600 not 1.6. If you leave the field blank the system allows you to select the engine capacity when you complete the **Type** field.

You can enter standard capacity to within 5% of the actual capacity, for example, 1300, 1600, etc. The system displays precise capacities when you view the type help window, for example, 1298, 1598, etc.

Registration	Enter the registration of the car, for example ABC 123D or D123 ABC.
	Vehicle Registration Lookup
	Vehicle Registration Lookup (UK/NI only) has been added to prompt for a vehicle registration (ESC **F**), which then calls an internet service to return the correlating vehicle details to MotorWriter so that the vehicle make, model, etc fields can all be automatically populated.
	This feature has to be explicitly activated by Open GI.

> For more information, please contact your Account Manager or the Sales Department on **01905 754455**.

Year Made   When you enter the registration the system completes the year automatically. However, most registrations cover two years and you can enter the year that the vehicle was manufactured. This is a mandatory field.

Type   When you place the cursor in this field a pop-up window displays manufacturing years for each car type. Select from the pop up window which is displayed automatically if there is more than one type for that model and year, for example L, SL, LX, etc.

The help window displays engine capacities, car type, number of doors and body type (5H = 5 door hatchback), fuel type (P=Petrol, D=Diesel), transmission type (M=Manual, A=Automatic) and years of manufacture as shown. It is possible for different engine capacities to have the same model types.

*If you entered an engine capacity in the **Capacity** field, the list of car types in the help window is restricted to the capacity that you entered.*

Value   Enter the approximate value of the car. This is usually obtained from the proposer.

Security   If you want to record any security details enter "Yes". The system displays the **Security Devices** window.

Refer to Security Devices for details of how to complete the Security Details window.

Car Details   This allows you to enter additional car details. If you require more details enter "Yes" in this field. The system displays the **Car Details** window.

Refer to Additional Car Details for more details of how to enter additional car details.

(Open-i Motor) Open GI

Vehicle Security

Many insurers offer substantial discounts for certain vehicle security devices. Some insurers insist that the vehicle has suitable security before they will even offer a policy.

The proposer should know whether the car has a security device fitted. Since the proposer may not know, at the time you are quoting, the exact name of the fitted device, you are provided with an unspecified option. If you use this option the system does not use the guarantee indicator when the premium is calculated. This safeguards the insurer and broker.

For the benefit of the proposer you should generate a quote with no security devices. The system will use the guarantee indicator to generate the premium. You can then re-quote using the unspecified option and indicate to the proposer the possible premium savings as a result of having an approved security device. Once the proposer provides the exact information concerning the security device you can re-quote to provide a guaranteed quotation.

(Open-i Motor) Open GI

Security Devices

This section describes how to complete the **Security Devices** window if you require details of any security associated with the car that the proposer wishes to insure.

When you enter "Yes" in the **Security** field of the **Vehicle Details** window the system displays the **Security Devices** window.

The following fields should be completed if the proposer has any security devices as the information affects guarantees:

| **Immobiliser Only** | Enter the type of immobiliser if one is fitted. Use the drop down list to obtain a list of ABI compliant immobiliser types. The system provides you with an Unspecified entry if the type is not listed. |

Fitted By	If an immobiliser is fitted, enter who fitted the device, for example, manufacturer, proposer, etc. Use the drop down list to obtain a list of available entries.
Alarm / Immobiliser	Enter the type of alarm or combined Alarm/ Immobiliser if one is fitted. Use the drop down list to obtain a list of ABI compliant alarm types. The system provides you with an Unspecified entry if the type is not listed.
Fitted by	If an alarm is fitted, enter who fitted the alarm, for example, manufacturer, proposer, etc. Use the drop down list to obtain a list of available entries.
Tracker Type	Enter the type of tracker if one is fitted. Use the drop down list to obtain a list of ABI compliant tracker types. The system provides you with an Unspecified entry if the type is not listed.
Fitted By	If a tracker is fitted, enter who fitted the device, for example, manufacturer, proposer, etc. Use the drop down list to obtain a list of available entries.

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Additional Car Details

This section describes how to complete the additional car details window if you entered "Yes" in the **Car Details** field in the Vehicle Details window.

The system displays the **Car Details** window with the following fields:

Car Code   This field should contain a system code which
relates to the car make and model that you
entered previously. If you did not enter a car
make and model, you can enter a car code which
will generate the correct field entries in the **Make**
and **Model** field

Fuel   Select the fuel type, "Diesel", "Elec.", "Hydrogen",
"LPG" or "Petrol". The system displays the fuel
type when you enter the make and model of the
car. You can amend it if the entry is incorrect.

Transmission   Select the type of engine transmission, for
example, "Manual" or "Automatic". The system
displays the transmission type when you enter
the make and model of the car. You can amend it
if the entry is incorrect.

Doors   Enter the number of doors, include the rear door
for hatchbacks and estates. The system displays
the number of doors when you enter the make
and model of the car. You can amend it if the
entry is incorrect.

Seats   Enter the number of seats within the car.

Body   Select the body type, for example, "Cabriolet",
                                 "Estate", etc. The system displays the body type
                                 when you enter the make and model of the car.
                                 You can amend it if the entry is incorrect. Use the
                                 pop-up help to obtain a list of available entries.

Date of Purchase   Select the date on which the car was purchased
                                 from the calendar.

The date of purchase cannot be before the Year Made or after the Cover Date.

Parking   Enter the location where the car is parked
                                 overnight. Use the pop-up help to obtain a list of
                                 available entries.

Modified   Enter "Yes" to indicate that the vehicle has been
                                 modified from the vehicle manufacturers original
                                 specification.

Up to 5 modifications can be entered. Press **F1** to display a list of modifications.

*You can only entered the **Unlisted Description** field if you have selected "Other".*

If you leave this field blank the system defaults to "No".

L.H.D.   Select "Yes" or "No" to indicate whether the
                                 vehicle is left-hand drive. If you leave this field
                                 blank the system defaults to "No".

ABS   Select "Yes" or "No" to indicate whether anti-lock
                                 brakes are fitted. If you leave the field blank the
                                 system defaults to "No".

Audio   Enter the value of any audio equipment.

Telephone   Enter the value of any mobile telephone
                                 equipment associated with the car.

Keeper	Select who is the keeper of the vehicle, for example, "Proposer", "Company", etc. Use the pop-up help to obtain a list of the available entries.
Owner	Select who is the owner of the vehicle, for example, "Proposer", "Vehicle Leasing Company", etc. Use the pop-up help to obtain a list of the available entries.

When you have completed all the necessary fields click the **OK** button (RETURN).

(Open-i Motor) Open GI

Entering Other Details

Entering Other Details

This section describes how to complete the **Other Details** window of the main quotation screen.

When you have completed the Vehicle Details the system automatically places the cursor in the **Other Details** window:

You should complete the following fields:

Who will drive	Select who the drivers of the car will be: "Insured Only", "Insured And Named" or "Any Driver". If you enter "Any Driver", the system requires you to complete at least one **Additional Driver** window which should be used to detail the most likely driver of the vehicle.

If you enter "Named" or "Any Driver" the system allows you to complete the following two fields: |

Number Named	Enter the number of named drivers. This field determines how many additional driver detail screens the system must display if you are naming drivers. The maximum number is four.
Aged Over	If you selected "Any Driver" in the **Drivers** field, then, the system moves to this field which allows you to enter an age limit for any drivers. This field is not available for other driver types.
Voluntary Excess	Enter the amount of voluntary excess that the proposer is prepared to pay in the event of a claim.
Further Details	This allows you to enter additional details. If you require more details enter "Yes" in this field. The system displays the <u>Further Details</u> window.
Broker Qs	The **Broker Qs** field is only displayed if you have answered "Yes" to the **Activate Broker Question Set o**n the <u>Amend Broker Details Screen 3</u> and there is a question set XML file present.
	Answer "Yes" to the **Broker Qs** field to display the <u>Broker Questions / Custom Quote Window</u>.

Further Details Window

Complete the following fields:

Policy Term
Enter the required length of the policy in months. The default value is 12.

Windscreen Cover
Select "Yes" or "No" to indicate whether windscreen cover is required. If you leave this field blank the system defaults to "No".

Ever Held Insurance
Enter "Yes" or "No" to indicate whether the proposer has ever held insurance before. This includes insurance policies held previously which have lapsed. If you enter "Yes" then the system displays the **Insurance** window.

Current Insurer Enter the name of the current insurer if applicable. Use the pop-up help window to obtain a list of available insurers.

Current Insurer Scheme Enter the type of policy that the proposer currently holds. Use the pop-up help window to obtain a list of available policies.

If the proposers company is not listed, use the 'Unspecified Insurance' option. Enter "U" directly in the **Current Insurer** field or press "U" with the pop up window displayed.

Period Since Enter the period since the proposer last held insurance in months and years. You can only complete this field if you entered "Yes" in the field and left the **Current Insurer** field blank. The system skips this field if the proposer is currently insured

Previous Insurance Paid

Enter the frequency over which the previous insurance was paid, for example, monthly. Press **F1** for a list of available options.

Any Other Claims

Enter "Yes" or "No" to indicate whether there are any other claims/losses by any named drivers of the vehicle, other then the proposer who are no longer included on this policy. If you enter "Yes" the system displays the Accidents (Other) screen.

Refer to Entering Accident Details for more information on how to complete this screen.

Holding Broker

Select "Yes" or "No" to indicate whether the client is currently insured through your brokerage.

Scheme Number

Enter a scheme number if applicable from 0 to 99.

Refer to System Maintenance for details of how to setup schemes.

Extended Questions

Enter "Yes" to display the Extended Terms Questions dialog, which is detailed below:

Non Motoring Convictions? Enter "Yes" or "No" to whether any driver have any non-motoring convictions.

Insurance Ever Cancelled? Enter "Yes" or "No" to whether this driver has ever had any insurance cancelled.

Ever Refused? Enter "Yes" or "No" to whether this driver has ever been refused insurance.

Restricted Terms Applied? Enter "Yes" or "No" to whether this driver has ever had terms applied.

Increased Premium? Enter "Yes" or "No" to whether this driver has ever had a premium increased.

Agg Qs

This field and the Aggregator Question Set will only appear if Custom Quote is activated for your site.

Enter "Yes" to display the Aggregator Question Set window.

Promo Code

This field will only appear if Telematics quote enrichment is activated for your site in the Proxy Gateway Settings.

The following field needs to be entered for a Telematics enrichment request to take place for New Business.

If the field is left blank then no enrichment will take place and a default Driver Score will be used.

Please refer to the About Telematics chapter in the BrokerLink guide for further information.

*The **Consent for Searches** field does not need to be answered for a Wunelli Telematics enrichment call.*

(Open-i Motor) Open GI

Broker Questions / Custom Quote Window

You will need to contract with Open GI for your own question set to be supported. Questions captured by Aggregator are also available within the quotation engines for brokers who have contracted for Custom Quote.

Custom Quote gives you the ability to integrate broker specific questions seamlessly into the MotorWriter question set for the purposes of rating.

They can also be amended at Mid Term Adjustment. Refer to the BrokerLink Amend Custom Quote Questions At MTA page.

Once your broker-defined question set is declared, they are stored in an XML file that is released as part of the rates.

A question set can only be server specific and not branch specific.

The **Broker Qs** field is only displayed if you have answered "Yes" to the **Activate Broker Question Set o**n the Amend Broker Details Screen 3 and there is a question set XML file present.

Answer "Yes" to the **Broker Qs** field to display the Broker Questions / Custom Quote Window. An example of a **Custom Quote** window is shown below:

The BQS Frame supports the storage and retrieval of the broker questions.

When you are printing a quotation, your broker question set will be printed for both the Broker and Client prints.

(Open-i Motor) Open GI

BQS Frame

The **BQS** Frame supports the storage and retrieval of your broker questions. Open GI release a very basic BQS frame format which shows all the possible Custom Quote fields and because there are so many, most of the haven't got a caption.

To have a more meaningful frame layout, you should generate your own BQS frame format instead. This is only possible using Open-i where you can use the 'Amend Open-i Frame Display' option. This allowed you to create your own BQS Open-i frame where you can add your own captions and reference the **BQS** fields that match your question set.

The basic Open GI **BQS** frame format is shown below:

BQS Keywords

The basic Open GI **BQS** frame format and keywords are shown below:

```
Connection  Setup  History

   BQS.Yesno1                              Keyword Selection    Module  BQS
   _____

   ***   ***    DD/MM/YYYY DD/MM/YYYY    9999999999 9999999999   9999999.99 9999999.99
   ***   ***    DD/MM/YYYY DD/MM/YYYY    9999999999 9999999999   9999999.99 9999999.99
   ***   ***    DD/MM/YYYY DD/MM/YYYY    9999999999 9999999999   9999999.99 9999999.99
   ***   ***    DD/MM/YYYY DD/MM/YYYY    9999999999 9999999999   9999999.99 9999999.99
   ***   ***    DD/MM/YYYY DD/MM/YYYY    9999999999 9999999999   9999999.99 9999999.99

   Ftx1:  XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX
   Ftx2:  XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX
   Ftx3:  XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX
   Ftx4:  XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX
   Ftx5:  XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX

    Vt1:  XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX
    Vt2:  XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX
    Vt3:  XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX
    Vt4:  XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX
    Vt5:  XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX


    SPACE BAR - Add    F2 - Insert Module    RETURN - Add and Exit    F3 - Exit
```

BQS.YesNo1	Generic Yes/No field
BQS.YesNo2	Generic Yes/No field
BQS.YesNo3	Generic Yes/No field
BQS.YesNo4	Generic Yes/No field
BQS.YesNo5	Generic Yes/No field
BQS.YesNo6	Generic Yes/No field
BQS.YesNo7	Generic Yes/No field
BQS.YesNo8	Generic Yes/No field
BQS.YesNo9	Generic Yes/No field

BQS.YesNo10	Generic Yes/No field
BQS.Date1	Generic date field
BQS.Date2	Generic date field
BQS.Date3	Generic date field
BQS.Date4	Generic date field
BQS.Date5	Generic date field
BQS.Date6	Generic date field
BQS.Date7	Generic date field
BQS.Date8	Generic date field
BQS.Date9	Generic date field
BQS.Date10	Generic date field
BQS.Integer1	Generic integer field
BQS.Integer2	Generic integer field
BQS.Integer3	Generic integer field
BQS.Integer4	Generic integer field
BQS.Integer5	Generic integer field
BQS.Integer6	Generic integer field
BQS.Integer7	Generic integer field
BQS.Integer8	Generic integer field
BQS.Integer9	Generic integer field
BQS.Integer10	Generic integer field
BQS.Decimal1	Generic decimal field

BQS.Decimal2	Generic decimal field
BQS.Decimal3	Generic decimal field
BQS.Decimal4	Generic decimal field
BQS.Decimal5	Generic decimal field
BQS.Decimal6	Generic decimal field
BQS.Decimal7	Generic decimal field
BQS.Decimal8	Generic decimal field
BQS.Decimal9	Generic decimal field
BQS.Decimal10	Generic decimal field
BQS.FreeText1	Generic free text field
BQS.FreeText2	Generic free text field
BQS.FreeText3	Generic free text field
BQS.FreeText4	Generic free text field
BQS.FreeText5	Generic free text field
BQS.List1	Free text representation of selected broker list entry
BQS.List2	Free text representation of selected broker list entry
BQS.List3	Free text representation of selected broker list entry
BQS.List4	Free text representation of selected broker list entry
BQS.List5	Free text representation of selected broker list entry
BQS.List1ID	Position in broker list of the selected entry from BQS.List1
BQS.List2ID	Position in broker list of the selected entry from BQS.List2
BQS.List3ID	Position in broker list of the selected entry from BQS.List3

BQS.List4ID	Position in broker list of the selected entry from BQS.List4
BQS.List5ID	Position in broker list of the selected entry from BQS.List5

(Open-i Motor) Open GI

Aggregator Question Set Window

*The **Agg Qs** field and the Aggregator Question Set will only appear if Custom Quote is activated for your site.*

The 12 questions captured by Aggregator are now available within Motor for brokers who contract for Custom Quote. These questions are stored on the AGM Frame.

These additional questions will not generically be transmitted within the EDI message.

They can also be amended at Mid Term Adjustment. Refer to the BrokerLink Amend Custom Quote Questions At MTA page.

Enter "Yes" to the **Agg Qs** field on the Further Details window and the following is displayed:

Children under 16?	*Field defaults to "No" when the field is passed.*
	Select "Yes" or "No" from the drop-down list.
Is the car imported?	Select from:

70

- Europe

- Japanese

- No

- UKSpec

- USA

What is your renewal price   Enter your renewal price.

How do you pay for your policy   How would you like to pay for your policy:

- Annually

- Monthly

Electronic Box fitted to your car?

Field defaults to "No" when the field is passed.

Select "Yes" if you are willing to have your driving monitored by an electronic box which could reduce your insurance quote, otherwise enter"No".

Do you use the car between 11pm and 6am?   Select from:

- Daily

- Never

- Occasionally

- Weekly

Number of Passengers you regularly carry in the evening   From the drop-down list, select how many passengers you regularly carry in the evening.

Number of Cars in the household (including this one)   From the drop-down list, select the number of cars in the household.

Do you regularly use the car in peak times?

Field defaults to "No" when the field is passed.

Select "Yes" if the car is regularly used in peak times (Mon-Fri 8-10am and 4-6pm) otherwise enter "No".

Have you held car insurance in your own name?

Field defaults to "No" when the field is passed.

Select "Yes" if car insurance has been held in your own name in the last two years, otherwise enter "No".

What type of home do you live in   From the drop-down list, select from:

- Barge

- Caravan

- Halls

- Houseboat

- Licensed Premises

- Other Flat

- Other house

- Own Flat

- Own House

- Quarters

Where is the car kept during the day?	From the drop-down list, select from:

- Carport

- Garage

- Locked Compound

- Parked on Drive

- Public Car Park

- Public Road

- Secure Car Park

- Third Party

- Unlocked Compound

- Workplace Car Park

Click the **OK** button (RETURN) once this screen is complete or press the **Cancel** button (ESC ESC).

(Open-i Motor) Open GI

Locate Bookmark

AGM Frame

The **AGM** Frame supports the storage and retrieval of the questions captured by the [Aggregator Question Set](#) for Motor.

Children Under 16	AGM.Childrenunder16	3 coded
Vehicle Imported	AGM.Vehicleimported	8 coded
Renewal Price	AGM.Renewalprice	999999
Preferred Payment	AGM.Preferredpaymnt	7 coded
Telematics Agreed	AGM.Telematicsagrd	3 coded
Night Use	AGM.Nightuse	12 coded
Night Passengers	AGM.Nightpassengers	coded

Cars in Household	AGM.Carsinhousehold	2 coded
Peak Use	AGM.Peakuse	3 coded
Own Prev. Insurance	AGM.Ownprevins	3 coded
House Type	AGM.Housetype	17 coded
Daytime Location	AGM.Daytimelocation	20 coded

(Open-i Motor) Open GI

Entering Proposers Details

Entering Proposer Details in Motor

This section describes how to enter the Proposer details. When you have completed the **Other Details** window the system automatically places the cursor in the **Proposer** window as shown below. Not all the information is required for a quotation.

The more information that you enter the more accurate the quote.

*For ROI, an additional Penalty Points field is shown next to the **Convictions** field.*

This screen contains the following fields:

Sex	Enter "M" for Male or "F" for Female. This is a mandatory field.
Date of Birth	Enter the proposer's date of birth or select from the calendar. The system automatically calc.lates the age.

This is a mandatory field.

Age	The system completes the **Age** field automatically based on the entry in the **Date of Birth** field. Alternatively, you can just enter the age of the proposer in this field.
Driving Status	Select the proposer status: "Main driver", "frequent driver", "casual driver", "non-driving".
Employ Details	This allows you to access the **Occupation Details** window. Enter "Yes" if you want to enter the proposer occupation details.

Refer to Employment Details for further information on entering Occupation details.

Personal Details	This allows you to access the **Personal Details** window to enter the proposer's personal information. Enter "Yes" if you want to enter the details.

Refer to Personal Details for details of how to enter personal details.

Accidents	Enter "Yes" and the Accidents window is displayed.
Convictions	Enter "Yes" and the Convictions window is displayed.
Disabled	Enter "Yes" and the Disabilities window is displayed.

Employment Details

This section describes how to enter occupation details for the proposer. This procedure also applies to any additional driver. When you enter "Yes" in the **Employ Details** field in the **Proposer** window the system displays the **Employment Details** window:

This allows you to complete full or part-time occupation details for the proposer as follows:

Full Time	Enter the proposer's full time occupation if applicable. Use the pop-up help to obtain a list of available entries. This field must be completed if you want to provide a guaranteed quotation. If this field is omitted the system may downgrade or remove any guarantees.
Business	Enter the business category of the proposer. Use the pop-up help to obtain a list of available entries. This field must be completed if you want to provide a guaranteed quotation. If this field is omitted the system may downgrade or remove any guarantees. Press **F8** and **F9** to scroll through the various screens.
Status	Enter the employment status of the proposer. This field must be completed if you want to provide a guaranteed quotation. If this field is omitted the system may downgrade or remove any guarantees. Click the ⬅ ➡ buttons (**F8** and **F9)** to scroll through the various screens.

Part Time
    Enter the proposer's part time occupation if not employed full time. Use the pop-up help to obtain a list of available entries (the list is the same as that for full time occupation).

    Enter the proposer's part time occupation if not employed full time. Use the pop-up help to obtain a list of available entries (the list is the same as that for full time occupation).

If the proposer has a full and part-time occupation you can enter both.

Business
    Enter the part time business category of the proposer. Use the pop-up help to obtain a list of available entries. This field must be completed if you want to provide a guaranteed quotation. If this field is omitted the system may downgrade or remove any guarantees.

Status
    Enter the part time employment status of the proposer. This field must be completed if you want to provide a guaranteed quotation. If this field is omitted the system may downgrade or remove any guarantees.

(Open-i Motor) Open GI

Personal Details

This section describes how to complete the **Personal Details** window for UK and NI. When you enter "Yes" in the **Personal Details** field the system displays the **Personal Details** window:

The system contains default details in some of the fields. You can change the defaults that are displayed using the 'Default Setup' option from the Main Options menu.

Refer to Setting Up Defaults for details of how to configure default setups.

Marital Status	Enter the proposer's marital status.
Residency	The system automatically enters the number of years of residency when you enter the date of birth, if this is incorrect you can amend it now.
Licence Type	Enter the type of licence currently held by the proposer.
Licence No.	Enter the driving licence number. Enter up to 18 characters.

> If you use MyLicence, entering a valid Driving Licence Number allows insurers access to the DVLA licence data. This is an 'enrichment' at a New Business quotation or during permanent Mid Term adjustment **for new drivers only**.

Validation is performed on the licence number, in accordance with the rules defined by the DVLA. Warning

messages are displayed, but this will not prevent you from quoting. An example of one of the warning messages is shown below:

User Help

Driver's marital status
Press F1 for Help

Driving Licence No: Characters 1 - 5 do not match surname

Period Held   Enter the number of months or years in the first field, that the proposer has held a licence. If the licence is less than one year old, enter the number of months and enter "M" in the second field. Otherwise enter "Y" for years.

Country Issued   Enter the country in which the licence was issued. Use the pop-up help to obtain a list of available entries.

Motor Orgs   Enter the motoring organisation that the proposer currently belongs to.

Pass Plus   Enter when the Pass Plus was obtained in the date format DD/MM/YYYY.

Other Vehicles   Enter "Yes" or "No" to indicate access to other vehicles, including past use of a company car. If you say "Yes", the system displays an additional pop-up window which allows you to detail additional car information.

Refer to <u>Other Vehicles</u> for details of how to complete the **Other Vehicles** screen.

Commuting   Enter "Yes" or "No" to indicate whether the proposer uses the vehicle for commuting purposes.

Extended Use   Enter "Yes" or "No" if the car is used for business. If you enter "Yes", the system displays an additional pop-up window which allows you to detail the additional uses.

Refer to <u>Extended Use</u> for details of how to complete the additional window fields.

Private Mileage   Enter an estimate of annual private mileage for that driver in that car.

No. of Tests   Enter the number of driving tests taken.

Homeowner   Enter "Yes" or "No" to indicate if the proposer is a homeowner.

Smoker   Enter "Yes" or "No" to indicate if the proposer is a smoker.

Drinker   Enter "Yes" or "No" to indicate if the proposer is a drinker.

Name and Address   Enter "Yes" if you want to enter the proposer's name and address details. The system displays an additional window which allows you to complete the following fields:

Title, Surname, Forenames Enter the proposer's full name.

Address Enter up to 4 lines for the proposer's address. This is not required to generate a quote.

> *If you have a licence for Open Address Lookup, an* ... *will be displayed against the 1st line of the address field. Clicking on this (or pressing **F1**) will present the **Open Address Lookup** dialog.*

Post Code Enter the proposer's Post Code.

Accidents Enter "Yes" or "No" to indicate whether the proposer has had any accidents within a specified period. If you enter "Yes", the system automatically displays the **Accidents** screen.

Refer to Entering Accident Details for details of how to complete the **Accidents** screen.

Convictions Enter "Yes" or "No" to indicate whether the proposer has any convictions. If you say "Yes", the system automatically displays the **Convictions** screen.

Refer to the section on Conviction Details for more details of how to complete the **Convictions** screen.

Disabilities Enter "Yes" or "No" to indicate whether the proposer is disabled. If you enter "Yes", the system automatically displays the **Disabilities** screen.

Refer to the section on Entering Disability Details for details of how to complete the **Disabilities** screen.

(Open-i Motor) Open GI

Open-i Motor

Other Vehicles Window

If you indicated that the proposer has another vehicle, the system displays the **Other Vehicles** window, as shown below:

If an additional driver has another car then, the system displays the **Other Vehicle Details** Window, as shown below:

This allows you to record brief details of any second car, whether the drivers own car or a company car, including past company cars.

Own Vehicle Details

You can complete the following fields for the driver's own car:

Own Vehicle   Enter "Yes" if the other car is the driver's own car. You cannot access the remaining fields unless you enter "Yes".

Vehicle Type   Enter the type of vehicle, "Private Car", "Commercial vehicle" or "Motorcycle".

Years NCB   Enter the number years of No Claims Bonus on the other vehicle.

Insurer   Enter the insurer of the other car. Use the pop-up help to access the available list of insurers.

Business Use   Enter "Yes" or "No" to indicate if the other vehicle is used for business purposes.

Company Car Details   If the other car is a company car or the proposer was at any time provided with a car, you can complete the following fields:

Company Car   Enter "Yes" if the proposer or driver has had access to a company car. If you leave this field blank you cannot access the following fields.

Sole Use   Enter "Yes" if the driver was or is the sole user of the car.

Years Driving   Enter the number of years the driver was or is driving the car.

Date Ended   Enter the date when access to the company car ended. Leave the field blank if the driver is still using the car.

When you have completed all the necessary fields click **OK** (RETURN) or click the ⊘ button **F11** to return to the main screen.

Second Car Details

This section only applies to the proposer and does not appear for an additional driver.

If you believe this to be a second car quotation, complete the following details for the first car:

Other Car
Enter "Yes" if you believe this to be a second car quotation. The default is no. If you enter "Yes" then complete the following fields as well.

Proposer
Enter the proposer of the first car, for example, "Proposer", "Spouse", etc. Use the pop-up help to obtain a list of available entries.

Years NCB
Enter how many years No Claims Bonus are on the first car.

Insurer
Enter the insurers code for the first car. Use the pop-up help to obtain a list of available insurers. If the insurer is not listed you can enter Unspecified Insurance.

*If you leave all these fields blank, the system defaults the **Second Car** field to "No".*

When you have completed all the necessary fields press the **Cancel** button (ESC ESC) to return to the previous screen.

(Open-i Motor) Open GI

Extended Use Window

If you indicated that the proposer or any additional driver uses the vehicle for more then just private use, the system displays the **Extended Use** window:

This window provides you with fields which allow you to identify the other categories of use:

Personal Business	Enter "Yes" if the vehicle is used for personal business by the proposer or driver.
Employers Business	Enter "Yes" if the vehicle is used for the proposer's or drivers employers business.

*For additional drivers the following field replaces the **Employers Business** field.*

Proposers Business	Enter "Yes" if the vehicle is used for the proposer's business.
Anothers Business	Enter "Yes" if the vehicle is used for another persons business by the proposer or driver.
Soliciting For Orders	Enter "Yes" if the vehicle is used for the soliciting

of orders by the proposer or driver.

Public Hire	Enter "Yes" if the vehicle is used for public hire by the proposer or driver.
	For UK & NI sites, the **Taxi Information** window is displayed, with the following fields:
	• **Local Licensing Authority** - select the district council from the list
	• **Base Office Postcode** - enter up to 10 characters for the base office postcode
Private Hire	Enter "Yes" if the vehicle is used for private hire by the proposer or driver.
	For UK & NI sites, the **Taxi Information** window is displayed, with the following fields:
	• **Local Licensing Authority** - select the district council from the list
	• **Base Office Postcode** - enter up to 10 characters for the base office postcode
Carriage of Goods	Enter "Yes" if the vehicle is used to transport goods by the proposer or driver.
Business Mileage	Enter the business mileage for the vehicle.

Entering Accident Details

The system provides you with an accident record screen. This screen allows you to record details of any accidents that the proposer or any named driver has had. A similar screen is used to record details for any driver of the vehicle no longer on the policy. The **Accident Screen** appears automatically when you enter "Yes" in the following fields:

• **Accidents** in the Proposer window.

• **Any Other Claims** in the Further Details window.

• **Accidents** in the Additional Drivers window.

The accident screen allows you to enter up to 5 accidents. This section describes how to complete the fields for one accident:

	Incident Date	Incident Type	% Recov	Claim Amount	NCB Affect	At Fault	Pers. Injury	TP Cost
1	06/07/1997	Accident		884	No	Yes	No	
	Policy: Prop'rs			Description: No other Vehicle				
2								
	Policy:			Description:				
3								
	Policy:			Description:				
4								
	Policy:			Description:				
5								
	Policy:			Description:				

User Help

Date incident Occurred

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Cancel   Ok

Incident Date   Enter the date of the accident.

Incident Type   Enter the type of incident. Use the pop-up help to obtain a list of valid entries.

% Recov   Enter 100 if the cost of the claim was fully recovered by the insured's insurer. The field should contain 0 or a numeric value of less than 100 to indicate that none or partial monies were recovered.

The **% Recov** field is not meant to be used as an indicator that the insured has made a recovery of any monies paid by him/her.

Claim Amount   This field should be used to identify the cost of the insured's own damage and not the total cost of the incident.

NCB Affect   Enter "Yes" or "No" to indicate whether the No Claims Bonus was affected. Use the pop-up help to select your entry.

At Fault   Indicate whether the proposer was at fault: "Yes", "Partial", "No Blame" or "Pending".

Pers Inj	Enter "Yes" or "No" to indicate whether any persons were injured.
TP Cost	This field is used to identify the amount of any third party costs. For example, the cost of damage repair to anyone elses property or person.

*The combination of the **Claim Amount** field and the **TP Cost** field will determine the total cost of the incident.*

Policy	Indicate whose policy the claim was made against: "Own", "Company", "Other" or Proposers". Use the pop-up help to select your entry.
Description	Enter a description of the accident. Use the pop-up help to obtain a list of available entries for the description.

When you have completed the necessary accident details press the **Cancel** button (ESC ESC) to return to the previous screen.

(Open-i Motor) Open GI

Entering Conviction Details

The system provides you with a conviction record screen. This screen allows you to record details of any motoring offence that the proposer or any named driver has incurred previously or may have pending. The **Conviction** screen shown below appears automatically when you enter "Yes" in the following field:

- **Convictions** in the <u>Proposer</u> window.

- **Convictions** in the <u>Additional Drivers</u> window.

The conviction screen allows you to enter details for up to 5 offences. This section describes how to complete the fields for one conviction:

Offence Date

Enter the date of the offence. The system identifies pending convictions by the date entered and the remaining fields being blank.

Conviction Date

Enter the date of the conviction. If the conviction is pending, leave this field blank.

Conv. Code

Enter the conviction code. Use the pop-up help to obtain a list of available conviction codes.

Sample Type

Enter the type of sample that was provided: Blood, Breath or Urine.

Sample Level

Enter the alcohol reading if sample was provided.

Fine

Enter the value of any fine that was imposed as a result of the offence.

Disq. Period

Enter the length of any disqualification period in months or years.

Pnts.

Enter any penalty points recorded on the drivers licence.

Acc. No.	If the conviction was the result of a particular accident which you recorded on the accident screen, enter the accident number.

When you have completed all the necessary conviction details press the **Cancel** button (ESC ESC) to return to the previous screen.

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Entering Disability Details

The system provides you with a **Disabilities** window. This allows you to record details of any disability or illness that the proposer or any named driver may have. The **Disability** window shown below appears automatically when you enter "Yes" in the following field:

- **Disability** in the Proposer window.

- **Disability** in the Additional Drivers window.

This screen allows you to record a whole range of disabilities or illnesses which may affect the driver. This section describes how to complete every field, however, it is unlikely that you would complete all the fields for any single driver.

Diabetes	Enter "Yes" or "No" to indicate whether driver is diabetic. The default entry is "No" if you leave this field blank. If you enter "Yes" the system displays the **Diabetes** window shown below and you should complete the following fields:

Years Since Enter the number of years since the onset of diabetes.

Years Stable Enter the number of years that the drivers diabetes has been stable.

History Of Attacks/ Coma Enter "Yes" or "No" to indicate any history of attacks or coma due to diabetes. The default is "No" if you leave this field blank.

Controlled By Enter how the diabetes is controlled. Use the pop-up help to obtain a list of available entries.

Sight/Hearing Loss

Enter "Yes" or "No" to indicate whether driver suffers any hearing or sight disability. The default entry is "No" if you leave this field blank.

If you enter "Yes" the system displays the **Sight/Hearing** window shown below and you should complete the following fields:

Sight/Hearing Loss(Proposer)

Sight Loss   -   Right Eye: [____] %   Left Eye [____] %

Disease Related? [____ ▼]

Years Since: [____]

Hearing Loss   -   Right Ear: [____] %   Left Ear [____] %

Disease Related? [____ ▼]

Years Since: [____]

User Help

Percentage of sight LOST in right eye

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Cancel   Ok

Sight Loss - Right Eye Enter the percentage of eyesight lost in the right eye.

Sight Loss - Left eye Enter the percentage of eyesight lost in the left eye.

Disease Related Enter "Yes" or "No" to indicate whether the loss of eyesight was disease related.

Years Since Enter the number of years since the onset of the loss of sight.

Loss Of Hearing - Right Ear Enter the percentage of hearing lost in the right ear.

Loss Of Hearing - Left Ear Enter the percentage of hearing lost in the left ear.

Disease Related? Enter "Yes" or "No" to indicate whether the loss of hearing was disease related.

Years Since Enter the number of years since the onset of the loss of hearing.

Loss of Limbs

Enter "Yes" or "No" to indicate whether driver limb disability. The default entry is "No" if you leave this field blank. If you enter "Yes" the system displays the **Loss of Limbs** window shown below and you should complete the following fields:

Loss Of Leg Enter any loss of the lower limbs: "Right", "Left" or "Both".

Disease Related Enter "Yes" or "No" to indicate whether the loss of lower limbs was disease related.

Years Since Enter the number of years since the loss or loss of use of the lower limbs.

Loss Of Arm Enter any loss of the upper limbs: "Right", "Left" or "Both".

Disease Related Enter "Yes" or "No" to indicate whether the loss of upper limbs was disease related.

Years Since Enter the number of years since the loss or loss of use of the upper limbs.

Other Infirmities

Enter "Yes" or "No" to indicate whether driver suffers any other infirmity. The default entry is "No" if you leave this field blank.

If you enter "Yes" the system displays the **Other Infirmities** window shown below and you should complete the following fields:

Other Infirmities Enter any other infirmity that the driver may be suffering from. Use the pop-up help to obtain a list of the available entries. The system allows you to enter up to three other infirmities.

Years Since Enter the number of years since the onset of the infirmity or disorder.

Years Stable Enter the number of years since the infirmity or disorder became stable.

Conditions Notifiable?

Enter "Yes" if the conditions are notifiable ,otherwise enter "No."

Renew Period

Enter how often the driver's licence must be renewed.

Automatics Only?   Enter "Yes" or "No" to indicate whether the driver is
                                            restricted to driving automatics. The default is "No" if you
                                            leave the field blank.

Wheel Knob?   Enter "Yes" or "No" to indicate whether the driver has
                                            had a wheel knob fitted as an aid. The default is 'No' if
                                            you leave this field blank.

Hand Controls?   Enter "Yes" if hand controls are fitted to aid this driver.

DVLA Advised? (UK)   Enter "Yes" if the DVLA been advised of all disabilities.

IIL Advised? (Ireland)

DVLA Issued Licence? (UK)   Enter "Yes" if the DVLA has issued a licence.

IIL Issued Licence? (Ireland)

When you have completed all the necessary disability information press the **Cancel** button (ESC
ESC) to return to the previous screen.

(Open-i Motor) Open GI

Entering Cover Details in Motor

This section describes how to complete the **Cover Details** window for UK and NI, as shown below:

Cover Details

Cover:	Comprehensive	
Years NCB>	16 ...	Prot.Bonus? Yes
Post Code:	LA11 6HD	
Cover Date:	08/09/2011	

*As with the previous windows, you may not be required to complete all the fields. The more details
you enter, the more accurate the quote.*

Cover   Select the type of cover required:
                                            "Comprehensive", "Third Party Fire and Theft"

(TPFT) or "Third Party Only" (TP Only).

Years NCB	Enter the number of years of No Claims Bonus. The system displays a window with the following two fields that you should complete.
Type	Enter the type of vehicle that the NCB was earned in: "Private Car", "Commercial Vehicle" or "Motorcycle".
Country	Enter the country in which the NCB was earned. Use the pop-up help to obtain a list of available countries.
Protected Bonus	Enter "Yes" or "No" to indicate whether insurance protection is required for the No Claims Bonus. If you leave this field blank the system defaults to "No".
Post Code	Enter the proposer's Post Code. This field is mandatory.
Cover Date	The system automatically enters the current date in this field. You can change this if required. You can only enter a date for which the system contains rating information.

If you enter an invalid date the system displays the following message:

```
WARNING: Rates are not available for this cover date
```

When you have completed all the necessary fields press RETURN to continue.

If you have specified additional drivers then the system provides the additional driver window for you to complete.

Refer to [Entering Additional Driver Details](#) for details on how to complete additional driver details.

If the proposer is the only driver then you can select from one of the following options:

- press ESC **W** to select an individual insurer and generate a quote.

- press the **Quote Selected** button (ESC **Q)** to select a list of insurers and start the quotation procedure.

- press the **Quote All** button (ESC **A)** to start the quotation procedure for all the insurers on the system.

(Open-i Motor) Open GI

Entering Additional Driver Details

This section describes how to complete the details for an additional driver. Since the cover and vehicle details are the same you need only to enter the personal details of the additional driver or drivers. The **Additional Driver** window is displayed if the proposer wants to include named drivers. The system allows you to include up to four named drivers.

Sex	Enter "M" for Male or "F" for Female. This is a mandatory field.
Date of Birth	Enter the additional drivers date of birth. The system automatically calculates the age.
Driving Status	Enter the additional drivers status: "Main driver", "frequent driver", "casual driver", "non-driving".
Employ Details	This allows you to access the **Occupation Details** window. Enter "Yes" if you want to enter the additional drivers occupation details.

Refer to Employment Details for details of how to enter occupation information for the additional driver.

Personal Details	This allows you to access the **Personal Details** window to enter the additional drivers personal information. Enter "Yes" if you want to enter the details.

Refer to Personal Details for details of how to enter personal details. The procedure is identical to the proposer details.

Relationship	Enter the relationship of the driver to the proposer. Use the pop-up help to obtain the list of available entries.
Accidents	Enter "Yes" or "No" to indicate whether the driver has had any accidents within a specified period. If you enter "Yes", the system automatically displays the **Accidents** window.

Refer to Entering Accident Details for details of how to complete the **Accidents** window.

Convictions	Enter "Yes" or "No" to indicate whether the driver has any convictions. If you say "Yes", the system automatically displays the **Convictions** window.

Refer to the section on the Convictions screen for more details of how to complete the **Convictions** screen.

Disabilities	Enter "Yes" or "No" to indicate whether the driver is disabled. If you enter "Yes", the system automatically displays the **Disabilities** window**.**

Refer to the section Entering Disability Details for details of how to complete the **Disabilities** window.

The cover and other details do not need to be changed as they always apply to the proposer.

When you have completed all of the necessary fields press RETURN or **F11** to move on to the next screen.

When you have completed all the additional driver fields select one of the following options:

- press ESC **W** to select an individual insurer and generate a quote.

- press the **Quote Selected** button (ESC **Q** or RETURN) to select a list of insurers and start the quotation procedure.

- press the **Quote All** button (ESC **A)** to start the quotation procedure for all the insurers on the system.

(Open-i Motor) Open GI

Excluding/Including Additional Drivers

Excluding/Including Additional Drivers

The system allows you to enter additional drivers and then exclude them from the quotation. The system marks the entered details for a driver as excluded, but does not remove the entered details. If the proposer then wants to include the additional driver you can reset the drivers status to included. Finally you can also delete any selected additional driver and recalculate the quotation.

If you save a quotation to Core Back-Office the system ignores any excluded drivers and the details are lost when you exit MotorWriter.

You can exclude an additional driver using either of the following methods:

1. Display additional drivers details and access the *Escape Options* menu by pressing ESC **F1**.

2. Select the 'Driver Maintenance' option.

3. Select the 'Exclude Driver' option and click the mouse (RETURN). The system marks the driver as excluded from the quotation by adding (E) in the top of the **Additional Driver Details** window.

4. To include the driver use the 'Include Driver' option from the *Escape Options* menu.

Or:

1. Display the additional driver details and press ESC **U** to exclude the driver. The system marks the driver as excluded from the quotation by adding (E) in the top of the **Additional Driver Details** window, as shown below:

2. To include a driver, display the additional driver details and press ESC **I**.

Deleting A Driver

To delete the details for any additional driver, select the 'Driver Maintenance' option followed by the 'Delete Driver' option from the *Escape Options* menu or display the additional driver details and press ESC **R**. The system clears the details for the selected driver.

(Open-i Motor) Open GI

Setting Up and Selecting Defaults

MotorWriter provides you with the facility to configure up to five default settings for all the fields in the main screen and all the associated windows. If you deal with particular types of policies you can create a set of default settings which appear automatically when you access MotorWriter.

Configuring Default Settings

This section describes how to configure a set of defaults. The procedure to maintain an existing set of defaults is identical.

To configure a default set of entries use the following procedure:

1. Select the 'Defaults Setup' option from the [⏻ Links] menu (ESC **D**).

2. The system displays the current list of default sets:

3. Place the cursor over one of the sets and then click the mouse (RETURN). The system changes to Default Setup mode as indicated in the top right hand corner of the screen.

4. You can now complete the required default fields in any of the four windows of the main screen, including any pop-up windows.

5. You can then select one of the following options from buttons on the toolbar.

   - **Clear the Risk Details** - this allows you to clear all your entries in the current default set up.

   - **Save these Defaults** - this allows you to save your defaults to a selected default set.

   - **Exit Defaults Setup Mode** - this allows you to exit the Default Setup mode without saving any entered details.

   *You can also press ESC **F1** to display a defaults menu which contains the three options above.*

   To save your default entries select the 'Save these Defaults' option. The system displays the **Defaults Save** window:

You can enter a new name or accept the current default name. Click the **OK** button (RETURN) to save. The system returns you to the **Main Entry** screen.

Selecting Defaults

When you start MotorWriter it initially assumes the default values of the first set listed in the Defaults list. If you do not require any entries when you first start up, then you must ensure that there are no entries in this set.

To select another default set use the following procedure:

1. Select the 'Default Setup' option from the *Escape Options* menu (ESC **F1**) and click the mouse (RETURN).

2. Select the default set that you require from the list displayed and click the mouse (RETURN). The system enters Default Setup up mode and displays the default entries for the selected set.

3. To return to the main entry screen with these entries, press ESC **F1**. The system displays the **Setup Exit** window.

4. Select the 'Exit Defaults Setup Mode' option and click the mouse (RETURN).

5. The system enters the selected default values in the **Main Screen** window.

(Open-i Motor) Open GI

Clearing A Quotation

The system allows you to clear all the entries for a quotation if you are not going to save the quote. To clear a quote use the following procedure:

1. Display the *Escape Options* menu (ESC **F1**).

Quotes for Selected Insurers

Quotes for All Insurers

Workings for any Insurer

Broker Maintenance

Swap to BROOM(Z)

Load BROOMS Details

Toggle Options

○ Clear Quote Details

Jump to Screen

Accident/Conviction Summary(X)

Mid-Term Calculator

Defaults Setup

Driver Maintenance
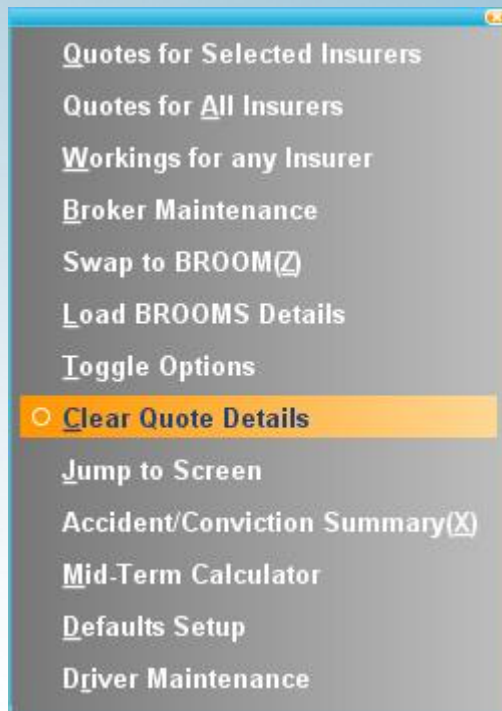
2. Select the 'Clear Quote Details' option and click the mouse (RETURN).

(Open-i Motor) Open GI

Accident/Conviction Summary

You can examine the client's accident and conviction details using the 'Accident/Conviction Summary (X)' option from the *Escape Options* menu (ESC **F1**) or by pressing the **Accident/Conviction Summary** button (ESC **X)** on the **Quotation Details** screen.

The system displays the **Accidents Summary** screen:

Press the ➡ button (**F11**) to move to the **Convictions Summary** screen:

Open-i Motor

(Open-i Motor) Open GI

Locate Bookmark

5: Generating Quotes

Generating Quotes

This chapter describes how to generate quotations when you have completed the main screens described in the previous chapter. The system allows you to generate quotes for all the insurers on the system or for any of the lists of insurers that you have created.

You can also re-calculate insurance premiums for an existing client using the Mid-Term Calculator facility provided when you are connected to a Core Back-Office system.

If you have not set up a list of selected insurers, then the system prompts you to select the insurers you require.

Refer to Maintaining Insurer Lists for more details of how to setup insurer lists.

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Guarantees

Displayed against your premiums on the quote screen will be a Big 'G' guarantee indicator or an "R".

- **Full Guarantee** - A Big 'G' against a premium means that this Insurer offers FULL PREMIUM and UNDERWRITING guarantee, so providing you adhere strictly to the terms and conditions of guarantee listed below, the insurer will honour the quotation.

- **Soft Refer** - an 'R' against a premium means a non Guaranteed Quotation. A referral is required for one or more aspects of the information given during the quotation generation process - you can proceed with the proposal and broke the referral.

- **! -** (Appears next to 'G' or 'R') indicates that area down rating or discount / loading applies therefore the insurer no longer guarantees the quote.

See the section **Referral Broking** section in the BrokerLink Manual.

Full Guarantee – Terms And Conditions (Big G)

Subject to an Agency Agreement being in force, Insurers offering the Full Guarantee will honour the premium quoted by an Open GI MOTORWRITER Motor Quotation system except for schemes specific to an individual intermediary.

Conditions of the Guarantee are:

1. The new business proposal and printed copy of the quotation showing full details must be sent to the insurer within 14 days of the inception date, or as directed by the Insurer. The risk details must, in all respects match the printed quotations with all relevant questions answered and all messages given taken into account.

2. The quotation must be produced from the rate and terms applicable to the date of inception, and the intermediary must have updated the system in accordance with all instructions provided.

3. Where the premium is 30% or more below the next insurers premium displayed, the guarantee will not apply unless referred in advance to the insurer for confirmation.

4. Any business placed on an EDI-only product MUST be transmitted electronically to the Insurer via a nightly network connection.

5. Any error notifications sent via the Open GI Mail-Link facility or via letter that refer to removal of guarantee status must be taken into account. The guarantee will not apply to any

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quotations issued following distribution of such information. The communication will also detail the date applicable for re-instatement of any guarantee.

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Downgrading Or Removal Of The Guarantee

MotorWriter includes the facility to downgrade or remove the guarantee flag which reduces the possibility of confusion and misunderstandings. The use of the G is designed to reassure you that the quotation really is guaranteed. There are two separate circumstances which may cause the guarantee to be downgraded from a full guarantee.

The occupation and business category of all drivers on the policy is vital particularly in relation to the class of use entered. These details affect the premium quoted and the acceptability of the risk to the insurer.

If either of these details is left blank or you enter unspecified then, the system automatically downgrades a full premium G and the guarantee status is left blank.

Downgrading Exceptions

If the drivers occupation is either Housewife, Retired or Unemployed, then it is not necessary to enter a business category. The guarantee is not downgraded in this instance.

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Vehicle Security

Many insurers offer substantial discounts for certain vehicle security devices. Some insurers insist that the vehicle has suitable security before they will even offer a policy.

The proposer should know whether the car has a security device fitted. Since the proposer may not know, at the time you are quoting, the exact name of the fitted device, you are provided with an unspecified option. If you use this option the system does not use the guarantee indicator when the premium is calculated. This safeguards the insurer and broker.

Once the proposer provides the exact information concerning the security device you can re-quote to provide a guaranteed quotation.

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Obtaining A Quote

To generate a set of quotations once you have entered all the necessary details, you can use one of the following options for the relevant version of MotorWriter:

This version does not allow you to generate quotations for all three cover types at the same time.

- press ESC **W** to generate a single insurer quotation and examine the workings. You cannot save the details to Core Back-Office from within this option or print a quotation.

- press the **Quote Selected** button (ESC **Q** or RETURN) to select one of the insurer lists

- press the **Quote All** button (ESC **A**) if you want to generate quotations for all the insurers.

Alternatively, you can select these functions from the *Escape Options* menu by pressing ESC **F1** to display the menu.
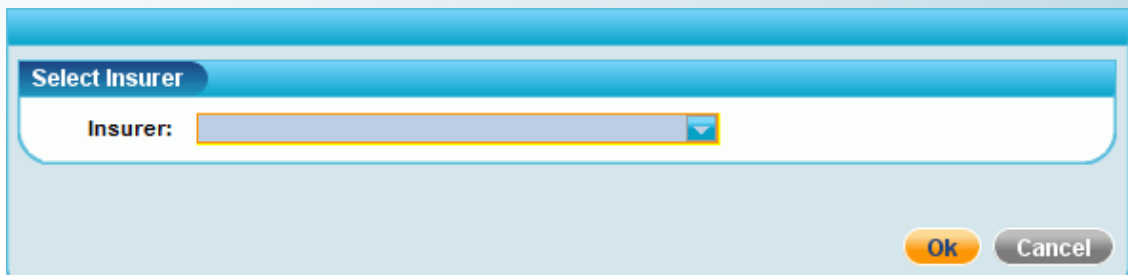
Quotation Screens

When you generate quotations for a list of insurers or all the insurers on the system the quotation screens are the same for both options. The only difference between the screens is the number of insurers displayed.

Selecting A Single Insurer

If you want to generate a quotation and examine the details for a specific insurer then, use the following procedure:

1. When you have completed all the proposers details press ESC **W**. The system displays an **Insurer Selection Box**:

2. Enter the insurers name or short reference code, for example ZUR for Zurich Solutions. Use the drop-down list facility to obtain a list of available insurers. When you have selected the insurer and click the **OK** button (RETURN) the system displays the quotation and its workings for the selected insurer.

    *Press ESC ESC at any time to return to the **Details** screens. If more than one page of workings is created, use the ⬅ ➡ buttons **F8** and **F9** keys to move backwards and forwards through the pages.*

3. When you have completed examining the details, press RETURN to return to the **Details** screens.

Selecting A List Of Insurers (Select Lists)

The system allows you to select a list of insurers using one of the following methods:

- Select a pre-configured list of insurers

- Create a list of selected insurers if no list exists

Refer to Maintaining Insurer Lists for more details of how to setup insurer lists.

MotorWriter allows you to select a list of insurers using the following procedure:

1. When you have completed all the quotation details press ESC **Q** (RETURN). The system displays the **List Selection** window as shown below:

2. Enter the list you require then, press the **OK** button (RETURN). The system generates the quotations for the insurers selected within the list.

*You can alter some aspects of the quote using the Toggle menu. To access the Toggle menu click the **Toggle Options** button (ESC **T**) or access the option from the main Escape Options menu.*

Creating An Insurer Select List

If no lists of insurers exist on the system, then you are prompted to create a list prior to generating quotations. Use the following procedure to create a new list and generate quotations:

1. If you have not previously configured a list of insurers the system allows you to create a list.

2. Enter a list number from 1 to 5 to identify the list you are creating, then press RETURN. The system displays a list of available insurers.

   The procedure is the same as that described in Creating A New Insurer List.

3. When you have completed selecting the required insurers, press RETURN, the system saves your selected list and begins the quotation generation process for that list.

   *You can alter some aspects of the quote using the Toggle menu. To access the Toggle menu click the **Toggle Options** button **(ESC T)** or access the option from the main Escape Options menu.*

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The Generated Quotation Screen

When you have selected a list of insurers or all the insurers on the system MotorWriter performs a quotation generation. Once the generation is complete the system displays the **Generated Quotation** screen similar to the example shown below:

If you have chosen to generate quotations for all insurers or your list of insurers exceeds 12, use the ← → buttons (**F8** and **F9)** to scroll to the additional screens.

The system displays a list of insurers with the following information for each insurer:

- Insurers - insurers name.

- Guarantee indicator - this indicates whether the quote is guaranteed by the insurer. "G" indicates Full Guarantee, "R" is a Soft Refer.

Refer to the Referral Broking section in the Brokerlink manual for further details.
Refer to the section Guarantees for details of the guarantee indicator and the related terms and conditions.

- Premium - calculated premium, also indicates any refusal.

- Excess - indicates the accepted excess or indicates reason for refusal.

- Commission - displays the monetary amount of commission for each scheme that has quoted if commission has been setup in Insurer Details

If the system has not calculated a premium but not refused cover, then you are instructed to contact the insurer with regard to the item that the system is not sure about. The item for referral is displayed in the Excess column.

The system always displays quotes in ascending order of premium, followed by referrals and finally refusals.

The guide month and year indicate the last time that rates where received from the insurer. Although regular rate updates are issued, they may not include all the insurers on the system.

---

*You can alter some aspects of the quote using the [Toggle menu](#). To access the Toggle menu **click the Toggle Options button (ESC T)** or access the option from the main Escape Options menu.*

Active Quote

If you are using Active Quote, MotorWriter will automatically call the Active Quote web service as part of a comparative quote and so any scheme, which has had 1 or more Active Quote rules applied to it, will then have the '@' symbol displayed against it when presented on the results screen (or quote printout). Refer to the **Active Quote** guide for further information.

Quotation Toggle Options

Quotation Toggle Options

To access the *Quotation Toggle Options* menu click the **Toggle Options** button (ESC **T**) or access the 'Toggle Options' option from the main *Escape Options* menu (ESC **F1**).

The *Quotation Toggle Options* menu provides you with the following options:
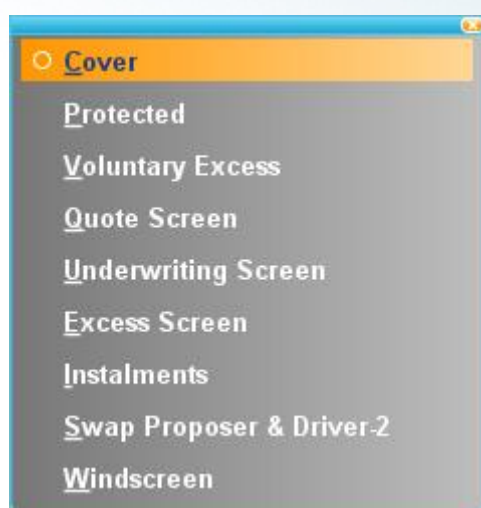
- **Cover** - this option allows you to change the cover type and recalculate the premiums for the selected list of insurers.

- **Protected** - this option allows you to toggle the NCB protected option and recalculate the premiums for the selected list of insurers.

- **Voluntary Excess** - this option allows you to change the amount of voluntary excess that the client wants to pay.

- **Quote Screen** - this option allows you to return to the quotation screen.

- **Underwriting Screen** - this option allows you to display the underwriting details for a selected insurer in the [Generated Quotation](#) screen.

- **Excess Screen** - this option allows you to display the excess details for a selected insurer in the [Generated Quotation](#) screen

- **Instalments** - this option displays instalment details for a selected insurer in the [Generated Quotation](#) screen.

- **Swap Proposer & Driver-2** - allows the [Proposer and Driver-2 details](#) to be instantly swapped.

Swap Proposer & Driver-2

This allows you to easily swap the proposer and driver 2 details. This is useful for swapping a husband and wife to see what the difference in price is. It saves a great deal of time as data does not need to be re-input.

The relationship will remain and will not swap because its not asked for the proposer.

The driving status will also remains and does not swap.

 If 'Other Car?' details are present for the Proposer, they will be lost as part of the swap. The following message will be displayed:
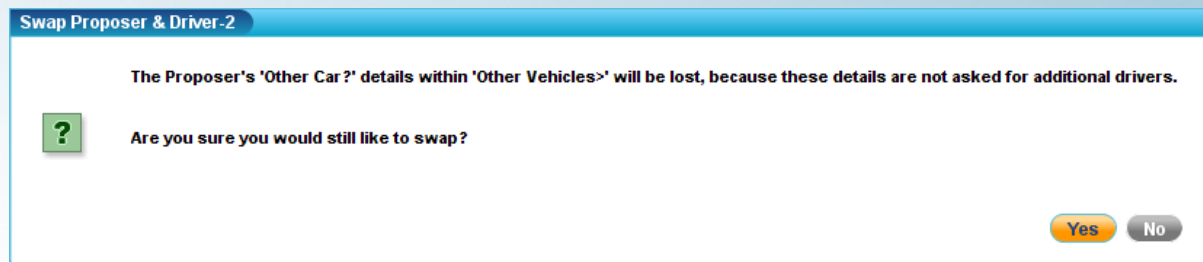
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Refresh Results

For Open-i sites, you can toggle the following fields on the quotation results screen:

- Cover

- Protected

- Excess

- Value

The example below shows the Cover being amended:

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You can then press the **Refresh Results** button (ESC **R**) allows the quotation results to be updated.

If you are using Active Quote, a fresh Active Quote call will be made as part of the 'Refresh Results' process.

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Quotation Options

Quotation Options

MotorWriter provides you with two menus which allow you to examine insurance workings and insurer details, as well as print a quotation.

The *Workings* menu - this provides you with facilities to perform the following for a selected quote:

- Examine the detailed workings of a selected quote.

- Produce a MotorWriter Risk Workings Snapshot

- Printout a copy of the quote for the client or a broker copy, including Policy Summary and Terms if required.

- View Policy Summary

- Requote for Core Back-Office.

The *Escape Options* menu - this provides you with a range of facilities already described in previous chapters, including the 'Workings for any Insurer' option. In addition this menu provides you with the following additional features:

- Save the quote to the main Core Back-Office system for future reference or generation of transactions.

- Complete a proposal for the client immediately.

Refer to the chapter New Business in the BrokerLink Manual for details of how to complete a proposal.
Refer to The Main Options Menu for details of how to access this menu.

To use the last option to complete a proposal you must have either BrokerLink or MotorForms on your system. Refer to your supervisor if this function does not appear on your system or does not function correctly.

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The Quote Options Menu (Motor)

This section describes how to use the *Quote Options* menu. To access the *Quote Options* menu you must generate at least one quotation then, use the following procedure:

1. Highlight the insurer you want to work with. Use the ARROW keys to scroll within the list displayed. To view more insurers use the scrollbar to move backwards and forwards through the insurer list.

2. Click the mouse on the selected insurer (RETURN). The system displays the *Quote Options* menu as shown below:

- Workings

- Printout / Policy Summary

- View Policy Summary

- Save to BROOMS

- Requote for BROOMS

Refer to the BrokerLink User Manual for details of how to complete a proposal.

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Examining Quotation Workings

If you generate quotations for a list or all insurers the *Quote Options* menu provides you with the facility to examine the detailed workings of a selected quotation.

Examining Workings

When you access the *Quote Options* menu select the 'Workings' option and click the mouse (RETURN).

The system displays the workings of the selected policy.

If the workings are contained on several screens use the scrollbar to move through the pages or click the **Close** button (ESC ESC) to return to the list of quotations. The details displayed on the screen depend on the selected insurer and the rate tables that the system has used to generate the quotation.

You can use the Risk Workings Snapshot Tool (ESC **X**) when the workings are displayed.

Using The Risk Workings Snapshot Tool

The generation of a premium and the underlying quote breakdown/workings can now potentially include one or more forms of quote enrichment along with Active Quote.

In order to greatly speed up any kind of premium/rating issue investigations, you can export the entire risk, the quote breakdown/workings, all enrichment data for that risk along with any Active Quote results to a single file to your PC (or network drive) using the Risk Workings Snapshot Tool.

Then under guidance from the Open GI support teams, this exported file can then be emailed directly into Open GI as an attachment where it can then be automatically uploaded into Open-i MotorWriter to enable the support teams to see the workings along with all the relevant risk data already pre-populated.

This Risk Workings Snapshot Tool essentially replaces the 'quote printout' for helping with any premium issues.

All the data is encrypted as part of the export process and can only be decrypted within Open GI as part of the upload process.

To Export A Risk Workings Snapshot

1. Display the workings for the required scheme, as shown below:

2. The export process is triggered by pressing ESC **X** on the workings screen for any of the supported products at new business or MTA.

Please provide up to 4 lines of text for any supporting/covering details:

You can optionally enter up to 4 lines of free text to provide supporting information. This text will also be exported.

Snapshot Filename:

Enter the full PC path and filename in which to store the risk data. This is where the exported risk will be saved to on your PC.

Please ensure the filename conforms to a standard windows filename. You must also have write access to the full destination folder (including any folders in the path that must already exist).

When the **Save Snapshot File** button (RETURN) is pressed, a snapshot of the risk in memory will be taken and will then be transferred to your PC into the specified snapshot file.

3. When the export is successful, it displays a confirmation message, as shown in the example below:
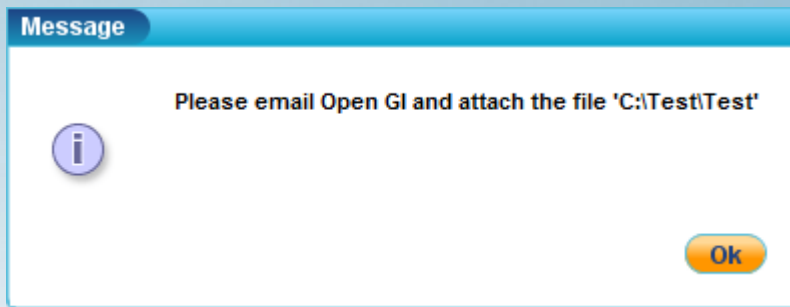
4. Click the **OK** button (RETURN) to continue and you can then attach the snapshot file to an email and send it to Open GI for analysis.

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Printing A Quotation

To Print A Quotation

To print the details of a quotation:

1. Select the 'Printout/Policy Summary' option from the *Quote Options* menu.

2. The *Print Options* menu is displayed, as shown below:

Printing A Broker Copy

To print the details of a broker copy quotation:

1. Select the 'Broker Copy' option from the *Print Options* menu. The **Broker Printout Additional Details** dialog is displayed:

2. Update the following fields, if required:

Insurer   The name of the selected insurer.

Reference   Enter a client reference code. If the system has
                               transferred a code from Core Back-Office, then
                               the transferred code is displayed.

Name   Enter the client's name if you did not enter a
                               name when generating the quote.

Address   Enter the client's address if you did not enter an
                               address when generating the quote.

                               *If you have a licence for Open Address Lookup,
                               an* [ ] *will be displayed against the 1st line of
                               the address field. Clicking on this (or pressing
                               F1) will present the* [Open Address Lookup](#)

dialog.

Premium	The calculated premium.
Print Top	Enter the number of top quotations for which you would like to print details. The name and premium of the top 'n' schemes are printed.
Print Policy Summary?	Enter "Yes" to print the Policy Summary.
Print Policy Terms?	Enter "Yes" to print the Policy Terms.

3. Press the **Print** button (RETURN) to print the broker copy of the printout.

   Make sure that your printer is connected and on-line.

   The quotation is printed immediately.

Printing A Client Copy

To print the details of a client copy quotation:

1. Select the 'Client Copy' option from the *Print Options* menu. The **Client Printout Additional Details** dialog is displayed:

2. Update the following fields, if required:

Insurer	The name of the selected insurer.
Reference	Enter a customer reference code; if the system has transferred a code from Core Back-Office, then the transferred code is displayed
Name	Enter the client's name if you did not enter a name when generating the quote.
Address	Enter the client's address if you did not enter an address when generating the quote.

> *If you have a licence for Open Address Lookup, an* ![] *will be displayed against the 1st line of the address field. Clicking on this (or pressing* **F1***) will present the Open Address Lookup*

dialog.

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Premium	The calculated premium.
Terms	Enter any additional terms that you want applied to the quotation. This is a series of 4 lines of free text fields.
Print Policy Summary?	Enter "Yes" to print the Policy Summary.
Print Policy Terms?	Enter "Yes" to print the Policy Terms.

3. Press the **Print** button (RETURN) to print the broker copy of the printout.

    Make sure that your printer is connected and on-line.

    The quotation is printed immediately.

Broker Question Set

If you are using Custom Quote, your broker question set will be printed for both the Broker and Client prints, as shown in the example below:

```
              Occupation : Teacher
          Bus. Category : Education
            Emp. Status : Employed




EXTENDED QUESTIONS
Non Motoring Convictions :No      Insurance Ever Cancelled : No
             Ever Refused : No     Restricted Terms Applied : No
        Increased Premium : No



ACCIDENTS           No


CONVICTIONS         No


BROKER QUESTION SET

Promotion Code: 123456
Are you a Club Member? Yes
Which Club are you a member of? Alfa Romeo
Renewal Date of membership: 10/12/2013
Agreed mileage per annum:       23223
Agreed Value:       232332
Valuation Date: 10/12/2013
Do you hold other policies with Open Insurance? Yes
 Bike
How long have you been a customer with Open Insurance:          2
 Year
Mirror Bonus? Yes
          2
Number of vehicles in household:       222
How long have you held your TAXI badge:       222
 Year
How are you paying: Cash


       WORKING:

BASE RATE               GROUP  16(F:MED1:2)    AREA 37:37:37(99:A)
                        DRIVER AREA 47:47:47(1:A)
OCCUPATION              Driver  1
```

Viewing Policy Summary Information

From the *Quote Options* menu, select the 'View Policy Summary' option and click on the mouse (RETURN)*.* This allows you to examine the postal and underwriting details of any selected insurer displayed in the **Quotation** screen.

```
Policy Summary

POLICY SUMMARY

This document is intended to provide you with basic details of your
motor insurance contract.
It is not a statement of the full terms and conditions of your
policy.
These can be found in your Policy Booklet and should be read in
"conjunction with your Policy Schedule, plus your Certificate of
Insurance."

In addition please see specific Endorsements which apply to your
policy as some sections may be restricted or excluded depending on
your individual circumstances.

This Insurance is provided by:-

Brit Insurance Limited
Valentines House
```

Close   Print

Use the scrollbar to scroll through the policy summary details on the screen.

Printout Policy Summary

The system allows you to print the Policy Summary Information by pressing the **Print** button (**F7)**.

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Requote for BROOMS

Requote For BROOMS

To obtain a requote and save the details back to Core Back-Office:

1.   Select the 'Requote for BROOMS' option from the *Quote Options* menu:

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2. MotorWriter displays the **BROOMS Requote** screen:

3. Amend the insurer, if required, or accept the default and press the **OK** button (RETURN).

The 'Requote for Brooms' option will create a fresh excess analysis frame (QXS) for the re-quoted risk if Policy Summary is activated in the Regulation Module. Any existing QXS frames will be historied depending on the BROOMS history option settings.

Premium Quote Printout Generation

When a quote is requoted using the 'Requote for BROOMS' option, upon completion of this a premium quote printout can be set to be generated, either automatically or via a prompted window. This depends on the Broker Amendment settings you have set on the **Premium Calculation Document - ReQuote** screen.

Refer to the Premium Calculation Document - Quote / ReQuote page in the Core Back-Office Part 1 Guide for further details.

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Mid-Term Calculator

This section describes how to use the Mid-Term calculator facility for non-EDI schemes which is available if you are connected to a Core-Back-Office system. The Mid-Term calculator allows you to revise a quotation and a policy in mid-term if any details which affect the premium change, for example the vehicle type. To use the Mid-Term calculator you must access Motor from Core-Back-Office using ESC **Z/X** to create a new client reference for the Mid-Term calculations. You must load the details from an existing client using ESC **L**, once you have entered Motor.

Mid Term Calculation

To perform a mid-term calculation, access Motor and then use the following procedure:

1. Access the *Escape Options* menu, by pressing ESC **F1**. If you used ESC **E** to enter the **Quotation Details** screen the system displays the ESC **F1** Menu ESC **E** menu.

2. Select the 'Mid-Term Calculator' option. The system displays the **M.T.A. Calculator** screen. This screen displays the following details:

BROOMS Ref.	The client reference which you are working from.
Clients Name	The name of the client whose details you are amending.
Insurer	The name of the insurer that you are calculating the adjustment for. You can change the insurer if required.

3. Press the **Save** button (RETURN) to accept the entries. The system adds the following fields at the bottom of the screen:

Last Renewal Date	The date the policy was last renewed.
Premium	The premium paid or quoted.
Excess	The voluntary excess for the policy.
Effective Date	The date from which the calculation is to take effect.

4. You can change the Effective Date to suit the client's requirements. Press the TAB key to move to the **Amend Which Details** field.

5. Enter "Address", "Cover", "Drivers", "Other" or "Vehicle", press the **Save** button (RETURN). The system returns you to the **Quotation** screen to allow you to edit the required details.

6. When you have completed the changes in the **Quotation** screen press the **Accept** button (RETURN). The system returns you to the **M.T.A. Calculator** screen and recalculates the premium. The adjustment to the premium is shown at the bottom of the **Adjusted Premium** screen:

7. To save the calculation press the **Save** button (RETURN). The system displays the **Drivers Supplementary Detail** window:

This window displays the following details for each driver on the policy:

Name   Main or additional driver name

Date of Birth   Drivers date of birth

Date Licence Obtained   Date that the driver obtained a licence

Date of Entry U.K   Date driver entered the United Kingdom.

You can amend any of these fields if required.

8. Press the **Save** button (RETURN) to accept these details. If you are changing the details for an existing client the system updates the CF module in Core Back-Office.

*The CF Module is accessed by pressing **F8** from the **Policy** screen.*

*You can amend these fields by pressing **F2**.*

If you are creating a new policy you are presented with the client details screen and you must create a new client reference for which **Core Back-Office** creates new modules.

*Further Mid-Term details for the client are recorded in the MD Module. This can be accessed from the Client/Policy screen by pressing ESC **3** and selecting the 'Display Modules' option. Enter the module number for the MD Frame and the MD Module screen will be displayed.*

If you are creating a new policy record you are presented with the client details screen and you must create a new client reference for which Core Back-Office creates new modules.

Refer to The Modules Menu section in the Core Back-Office Guide (Part 1) for details of how to examine and save a module.

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Edit Core Back-Office Risk Level Frames (ESC E)

Use this option to copy the details from Core Back-Office into Motor. Details can then be updated and then copied from Motor back into Core Back-Office.

You can edit Core Back-Office Risk Level frames using ESC **E** to enter MotorWriter.

1. The **Main Entry** screen is displayed in Risk Level Edit Mode:

*For ROI, an additional Penalty Points field is shown next to the **Convictions** field.*

2. Amend the details as required.

3. Press the **Update L3 Frames** button (ESC **S)**. The **Drivers Supplementary Details** screen is displayed.

4. Press the **Save** button (RETURN). The amendments are saved back to the Risk Level frame.

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6: Transferring Data

Transferring Data

The MotorWriter quotation facility can be integrated within Core Back-Office. The system then allows you to use Core Back-Office to save and restore MotorWriter quotations or generate proposal documents. If you are authorised to issue insurance and cover note documents then your system also includes a link into Brokerlink.

This chapter describes the following data transfer functions in MotorWriter which are linked to the main system:

- Loading Details From BROOMS

- Saving A Quotation To BROOMS

- Generating A Proposal Using BrokerLink

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Loading Details From Core Back-Office

This section describes how to load Risk level details from Core Back-Office into the **MotorWriter Quotation** screens. Core Back-Office does not directly provide you with a quotation facility. However, the **Risk Level** screen for car insurance policies (CF, PC, PC3, etc) does allow you to enter details which can be transferred into MotorWriter.

The transfer of data from Core Back-Office is most commonly performed for existing customers who are renewing their policy. New customers are most commonly dealt with directly through MotorWriter.

Once in MotorWriter follow the data input procedure described in Entering Quotation Details and Generating Quotes.

To load details from Core Back-Office use the following procedure:

1. Select the 'Client/Policy Details' option from the *Client Record & Accounts* menu.

2. Enter the Client/Policy reference for an existing client, then click **Find** button (RETURN). The system displays the **Client Details** screen.

3. Enter "PCXX" (where XX is the policy reference) after the client reference or click on the policy at the bottom of the screen (RETURN). The system displays the Policy **Level Insurer Details** screen.

4. To transfer the details to MotorWriter you can use one of the following:

   - select the 'MotorWriter MTA' option from the *Links* menu (ESC **E)** - to amend existing details without performing a quotation

   - select the 'MotorWriter' option from the *Links* menu (ESC **Z)** - to generate quotations and save the details to a new client record

   If you select the 'MotorWriter' option from the *Links* menu (ESC **Z)**, the system then displays the **MotorWriter Proposer** screen.

   If you use the 'MotorWriter MTA' option from the Links menu (ESC E) to access MotorWriter, the system automatically transfers the details of the selected client.

5. To transfer the details that you entered or restored in Core Back-Office click the **Load Risk** button (ESC **L)**. The system updates the screen with the details entered in Core Back-Office.

> *The system performs a check, providing the functionality has been enabled in Broker Amendment, to determine whether claims which exist in ClaimsWriter also exist in the clients level 3 details. If there are claims present in ClaimsWriter which do not match the risk level details, a warning screen is displayed.*
>
> *If a warning screen is displayed, it is recommended that you update the client's risk level details with the claims specified in ClaimsWriter.*

6. You can now complete the **Quotation** screens and generate a quotation.

> *If you use the 'MotorWriter MTA' option from the Links menu ESC **E**, you can amend or change any details, but not generate a new quotation directly. You can use the Mid-Term Calculator to requote the client.*

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Saving A Quotation To BROOMS

Saving A Quotation To Core Back-Office

Save To BROOMS

This section describes how to save data to Core Back-Office when you have generated a quotation. MotorWriter can save quotation details directly if it is linked to Core Back-Office. The system uses this link to store quotation details for future reference.

To save a quotation in Core Back-Office use the following procedure:

1. When you have completed all the necessary screens in MotorWriter and generated a list of quotations, highlight the insurer quote that you want to save. Use the mouse or ARROW keys to scroll within the list displayed.

2. Click the mouse (RETURN) to access the *Quote Options* menu:

3. Select the 'Save to BROOMS' option from the menu and click the mouse (RETURN). The system displays the **Driver Supplementary Detail** window. This window displays the following details for each driver on the policy:

Name	Main or additional driver name

Date of Birth	Drivers date of birth

Date Licence Obtained	Date that the driver obtained a licence

Date of Entry UK	Date driver entered the United Kingdom.

You can amend any of these fields if required.

4. To accept the entries and transfer the quotation details to the Core Back-Office, click the **Save** button (RETURN).

    The system displays the **Transfer to BROOMS Ref**. screen:

This screen allows you to enter a new Core Back-Office client reference or select an existing client reference under which the quotation details can be stored. The cursor appears at the top of the screen. You have several options at this stage:

- [Save to a known client reference](#)

- [Display a selected or complete list of client references and select from the list](#)

- [Create a new client reference](#)

Premium Quote Printout Generation

When a quote is manually saved using the 'Save to BROOMS' option, upon completion of this a premium quote printout can be set to be generated, either automatically or via a prompted window. This depends on the Broker Amendment settings you have set on the **Premium Calculation Document - Quote** screen.

Refer to the [Premium Calculation Document - Quote / ReQuote](#) page in the Core Back-Office Part 1 Guide for further details.

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Entering A Known Reference

To enter an existing client reference without referring to the list of clients on the system use the following procedure:

1. Enter a reference, for example HAFC, click the **Search** button (RETURN):

2. The system lists the selected client reference to confirm that your selection exists. To accept the reference press RETURN.

3. The system displays the **Policy Details** screen. This screen is equivalent to the **Level 2 Client** screen in Core Back-Office. When you complete this screen you are transferred to the Policy **Level Core Back-Office.** This screen contains the basic details which are contained in MotorWriter. Additional fields required in Client level and Policy level are displayed as blank and should be completed.

> Refer to the Core Back-Office Part 1 Guide for more information on how to complete Client Level and Policy Level screens in detail.

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Searching For An Existing Client Reference

The system allows you to search for an existing client reference if you are not sure of the reference. You can search by using a partial client reference or by searching for a particular client name or part of a name as follows:

1. To search by client reference, enter a partial code to list existing customers, for example enter "C" to list all customer references starting with C.

2. You can also search by using the **Name Contains** field to define a more precise search. For example, to list all customer names containing the name Harrison, enter HARRISON in this field and press RETURN.

3. Press the **Search** button (RETURN) to display the list of references:

4. When you have located the reference that you require, place the highlight bar on the client reference and click the left mouse button or press RETURN.

5. The system displays the **Policy Details** screen:

6. Complete the details and press the **OK** button (RETURN).

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Creating A New Client Reference

To save the quotation details under a new client reference use the following procedure:

1. Enter a reference, for example HAFC and then press the **Create New Client** button (ESC **1**).

2. The system displays the **Client Details** screen. You are required to complete the following fields:

Client master	This allows you to enter a master template code. To use the Core Back-Office default leave the field blank
Name	Enter the proposer's name.
Address	Enter the proposer's address details.
Occupation & code	Enter the proposer's occupation and corresponding code if relevant.
Post Code	Enter the Post Code.
Sex	Enter "Male" or "Female".
Marital Status	The system displays the marital status of the proposer if entered in MotorWriter. You can

update or amend this field if required.

No of Children   Enter the number of children the proposer has.

Contact   Enter a contact name if you are dealing with a company.

Telephone No   Enter the contact telephone number.

Letter Title   Enter the letter title of the proposer, e.g. Mr Caffrey, Mrs Caffrey, etc.

Forenames   Enter the proposer's forenames.

Date of Birth   The system displays the Date of Birth.

Executive   Enter your executive code if relevant.

Agent   Enter your agency code if relevant.

Statement   Enter "Yes" if the client requires statements.

Invoice   Enter "Yes" if the client requires invoices.

Credit Rating   If applicable enter the clients credit rating.

Prospect Code   If applicable enter the clients prospect code.

Mailshot code   If applicable enter a mailshot code.

3. You can amend any of these fields if required. To accept the details click the **OK** button (RETURN).

4. The system displays the **Policy details** screen.

This screen is equivalent to the Policy **Level Client** screen in Core Back-Office. When you complete this screen you are transferred to the Policy **Level Core Back-Office** screen, this screen contains the basic details which are contained in MotorWriter. Additional fields required in client level and Policy level are displayed as blank and should be completed.

Refer to the Core Back-Office Manual for details of how to manage and work with Client Level and Policy Level screens.

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Generating A Proposal Using BrokerLink

Generating A Proposal Using BrokerLink

This section describes how to initiate a proposal once the client accepts a quotation. If you are authorised to produce documentation the system uses BrokerLink to generate the actual proposal. If you are using Core Back-Office directly with MotorWriter then you access BrokerLink from MotorWriter directly.

Most of the data that you enter in MotorWriter is transferred over to BrokerLink, which means it only needs to be entered once.

Once the data has been transferred to BrokerLink you cannot amend it. You should ensure that all the data that you enter in MotorWriter is correct. Do not rely on the MotorWriter defaults to produce a quote that is acceptable to BrokerLink.

If you select a quote which is referred or refused, you cannot use BrokerLink to generate a proposal.

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Proposals Direct From MotorWriter

When you access MotorWriter directly from Core Back-Office the system allows you to produce proposals directly from MotorWriter. Use the following procedure to initiate a proposal from MotorWriter.

1. Generate a list of quotations.

2. Select the required insurer quotation and click the mouse (RETURN). The system displays the *Quote Options* menu.

3. Select the 'Complete a Proposal' option and click the mouse (RETURN). The system displays the **Drivers Supplementary Detail** pop-up window. This window displays the following main and additional driver details:

Name	Driver name.
Date of Birth	Drivers date of birth.
Date Licence Obtained	Date driver obtained licence.
Date of Entry into	Date of entry into the U.K if applicable.

Check the entries in these fields are correct and update them if necessary. You cannot amend this information once you are transferred to BrokerLink.

If you entered details for additional drivers, these are also displayed and you should check them.

4. To accept the details click the **Save** button (RETURN).

If the quotation is not linked to a client record in Core Back-Office, then you are prompted for a client reference. Enter the first four characters of the client reference - the system then checks for a matching reference. You can either select an existing client or create a new one.

5. The system transfers the details to **BrokerLink Proposal** screens.

Refer to the [BrokerLink User Manual](#) for details of how to complete a proposal.

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7: Frames and Keywords

Frames and Keywords

The following frames are used in MotorWriter:

- [CF - Car Facts](#)

- [PC - Private Car](#)

- [PC1 to PC9 - PC Details](#)

- [AX – Accident And Conviction Details](#)

- [DI – Illness And Disability Details](#)

- [ERM - Quote Enrichment](#)

- [TMX - Telematics](#) (if Telematics is switched on in the [Proxy Gateway Settings](#))

- BQS - stores your [custom quotes questions](#), if enabled

- [EXS - Enhanced Excesses](#)

> To ensure you get the most recent set of keywords, it is best to print the required frame out. See the section [Accessing Keywords for Non Displayed fields](#) in the Core Back-Office Frames and Keywords Guide for details on how to do this.

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CF Frame Keywords (Car Facts)

```
CF.Rated.postcode                    Keyword Selection   Module  CF
_____

Car Code : 99999999       Capacity   : 9999      Vol Xs   :   9999
Make     : ******************** Fuel       : ******    Comp Xs  :   9999 XX
Model    : XXXXXXXXXXXXXXXXXXX Gears      : *********   Prem Load:    999 %
Type     : XXXXXXXXXXXXXXX     Body       : *********   Audio    : 999999
Reg'n No : XXXXXXXXXX          Seats/Doors: 99 / 9      Telephone: 999999
Parking  : *****************    Value      : 999999      Owner    : **********
Date Made: DD/MM/YYYY          Postcode   : XXXXXXXXXX  Keeper   : **********
Date Prch: DD/MM/YYYY          Eircode    : XXXXXXXXXX  Mod / LHD: *** / ***
                                                        Step Back: ***

Cover     : ************* Drivers   : ***************** Prt NCB: ***
Cover Date   : DD/MM/YYYY XXXXX  No. Named : 9          Windscreen: ***
Ins Scheme   : XXXX            Aged Over : 99           Policy Term: 99
Class of Use : ********       All Female: ***          Holding Brkr: ***
Ever Held Ins: *** Sch: XXXX    Motor Orgs: **********  Scheme No: 99
Last Insurer : *************************************************************
Prev.Ins Paid: **********************      Consent for Searches? ***
Alarm/Immob. : ********************    Fitted By ********************
Immob. Only  : ****************************    ********************
Tracker      : *******************        ****************** ABS: ***
               ----------------------------------------------------------
Second Car   : *** Proposer: ****************** Yrs NCB: 99 Insr: XXXX
SPACE BAR - Add    F2 - Insert Module   RETURN - Add and Exit   F3 - Exit
```

Field Name	Keyword
Car Code	CF.Car.code
Make	CF.Make
Model	CF.Model
Type	CF.Type
Reg'n No	CF.Reg
Parking	CF.Parking
Date Made	CF.Date.made

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Date Prch	CF.Purchasedate
Capacity	CF.Engine.size
Fuel	CF.Fuel
Gears	CF.Gears
Body	CF.Body
Seats/Doors	CF.Seats
	CF.Doors
Value	CF.Value
Postcode	CF.Rated.postcode
Eircode	CF.Eircode
Vol Xs	CF.Vol.xs
Comp Xs	CF.Compxs
	CF.Compxstype
Prem Load	CF.Premload
Audio	CF.Audio
Telephone	CF.Telephone
Owner	CF.Owner
Keeper	CF.Keeper
Mod / LHD	CF.Modified
	CF.Lhd
Step Back	CF.Step.back
Cover	CF.Cover

Cover Date	CF.Cover.date	
	CF.Covertime	145
Ins Scheme	CF.Ins.scheme	
Class of Use	CF.Class.of.use	
Ever Held Ins	CF.Ever.insured	
Sch	CF.Curr.inscode	
Last Insurer	CF.Current.insurer	
Prev.Ins Paid	CF.Previouspayment	
Drivers	CF.Drivers	
No.named	CF.No.named	
Aged Over	CF.Aged.over	
All Female	CF.All.female	
Motor Orgs	CF.Motor.orgs	
Prt NCB	CF.Protected.bonus	
Windscreen	CF.Windscreen	
Policy Term	CF.Term	
Holding Brkr	CF.Holding.broker	
Scheme No	CF.Scheme	
Consent for Searches	CF.Cnsntforsearches	
Alarm/Immob	CF.Alarm.type	
Fitted By	CF.Alarm.fitted	
Immob. Only	CF.Immob.type	

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	CF.Immob.fitted
Tracker	CF.Tracker.type
	CF.Tracker.fitted
ABS	CF.Abs
Second Car	CF.Second.car
Proposer	CF.Proposer
Yrs NCB	CF.Years.ncb
Insr	CF.Fc.inscode

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Locate Bookmark

CF.Immob.fitted

PC - PC9

PC Frame

PC Frame

The **PC Frame** with keywords is shown below:

```
PC.Name                              Keyword Selection   Module   PC
_____

Name         : XXXXXXXXXXXXXXXXXXXXXXXXXXXXX    DOB : DD/MM/YYYY
Driving Status: ***************    Acc/Conv      : ***  Disabled: ***
Sex          : ******           Penalty Points : ***
Marital Status: ***************    Commuting     : ***
Entry Date   : DD/MM/YYYY        Private Mileage : 999999
Licence Type : *************     Business Mileage: 999999
Licence No.  : XXXXXXXXXXXXXXXX    NCB Type       : ******************
MyLicence Cnsnt: ***             NCB Country    : ********************
Country Issued: ********************  NCB Base / Years: DD/MM/YYYY  / 99
Date Obtained : DD/MM/YYYY  Tests: 99  NCB Prejudiced : ***
Smkr/Drkr/HOwner: *** *** *** LLAuth: **************************************
Occup. (F.T) : ***************************** Emp. Status: ****************
Bus. Category: ***************************** Emp. Status: ****************
Occup. (P.T.): ***************************** Driving Qualification: ***
Bus. Category: *****************************         DOC: ***
 Personal Bus: ***       Anothers Business: ***  Carriage of Goods: ***
Employers Bus: ***    Soliciting for Orders: *** Public/Private Hire: *** / ***
 Pass Plus: DD/MM/YYYY   Base Office PCode: XXXXXXXXXX
Other Vehs: *** Non Mot/Cancel/Refuse/Restricted/Increase *** *** *** *** ***
Own Veh  : *** NCB: DD/MM/YYYY Veh Type: ****************** Ins of Veh: XXXX
Comp. Car : *** NCB: DD/MM/YYYY End Date: DD/MM/YYYY        Priv Use  : ***
SPACE BAR - Add    F2 - Insert Module    RETURN - Add and Exit    F3 - Exit
```

Field Name	Keyword
Name	PC.Name
Driving Status	PC.Driver.status
Sex	PC.Sex
Marital Status	PC.Marital.status
Entry Date	PC.Ukdate
Licence Type	PC.Licence

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Licence No.	PC.Drivinglicencenumber
MyLicence Cnsnt	PC.Mylicdvrcnsnt
Country Issued	PC.Licence.country
Date Obtained	PC.Dateobt
Disabled	PC.Disabled
Tests	PC.Number.of.tests
Smoker/Drinker/Homeowner	PC.Smoker
	PC.Drinker
	PC.Homeowner
DOB	PC.Birthdate
Acc/Conv	PC.Accconv
Penalty Points	PC.Penalties (ROI Only)
Commuting	PC.Commuting
Private Mileage	PC.Private.mileage
Business Mileage	PC.Business.miles
NCB Type	PC.Ncb.type
NCB Country	PC.Ncb.country
NCB Base / Years	PC.Ncbdate
	PC.Own.ncb
NCB Prejudiced	PC.Ncbprej
Occup. (F.T)	PC.Ft.occup
	PC.Occupation
Bus.Category	PC.Ft.bus.cat

Emp.Status	PC.Status
Occup. (P.T)	PC.pt.occup
Bus. Category	PC.Pt.bus.cat
Emp. Status	PC.Pt.emp.status
Driving Qualification	PC.Drivingqualificationtrigger (ROI only)
DOC	Pc.Bldocind
Personal Bus	PC.Personal.bsness
Employers Bus	PC.Emp.business
Anothers Business	PC.Anothers.bsness
Soliciting for Orders	PC.Soliciting
Carriage of Goods	PC.Carriageofgoods
Public/Private Hire	PC.Hire
	PC.Private.hire
Base Office Post Code	PC.Bopostcode
Local Licensing Authority	PC.Llauthority
Base Office Post Code	PC.Bopostcode
Pass Plus	PC.Passplus
Other Vehs	PC.Other.vehicles
Non Mot/Cancel/Refuse/Restricted/Increase	PC.Nonmotorconvictions
	PC.Insurancecancelled
	PC.Refusedinsurance
	PC.Termsapplied
	PC.Increasedpremium

Own Veh	PC.Own.vehicle
NCB	PC.Ownvehncbdate
Veh Type	PC.Ownvehicletype
Ins of Veh	PC.Own.insurer
Comp. Car	PC.Company.vehicle
NCB	PC.Compvehncbdate
End Date	PC.Companydateend
Priv Use	PC.Company.private

PC Risk Level Frame

The **PC Risk Level** Frame is shown below:

PC 1 Frame

```
 Connection  Setup  History

  PC1.NCBDisc                              Keyword Selection    Module   PC1


            *   No Claims Bonus 99.99 %         Open Certificate ***
            *                    99 Years       Policy Suspended DD/MM/YYYY
  General   *   Intro. Discount 99.99 % Impsd Driving Restriction **************
  Details   *               Scheme Name XXXXXXXXXXXXXXXXXXXXXXXXXXXXXX
            * Rating Area:  Description XXXXXXXXXXXXXXXXXXXX
            *                  Comments XXXXXXXXXXXXXXXXXXXXXXXXXXXX
            *    Proposer: Vehicle Owner ***      Registered Keeper ***
            *               Main Driver ***        Use of another Car ***
```

Field Name	Keyword
No Claims Bonus	PC1.NCBDisc
99 Years	PC1.NCBYears
Intro. Discount	PC1.IntDisc
Open Certificate	PC1.OpenCert
Policy Suspended	PC1.Polsus
Impsd Driving Restriction	PC1.Restric
Scheme Name	PC1.Scheme
Rating Area : Description	PC1.Descrip
Comments	PC1.Comm
Proposer: Vehicle Owner	PC1.Owner
Main Driver	PC1.Driver

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Registered Keeper	PC1.Keeper
Use of another Car	PC.Anncar

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PC2 Frame

```
Connection  Setup  History

 PC2.NoDrivers                              Keyword Selection    Module   PC2


   Additional*   Number of Drivers   99      No. Under 21  99     No. Under 25  99
    Drivers   *  Female Drivers Only ***    Excl Under 21 ***    Excl Under 25 ***
```

Field Name	Keyword
Additional Number of Drivers	PC2.NoDrivers
No. Under 21	PC2.NoUnd21
No. Under 25	PC2.NoUnd25
Drivers Female Drivers Only	PC2.Femonly
Excl Under 21	PC2.Und21only
Excl Under 25	PC2.Und25only

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Locate Bookmark

PC3 Frame

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The **PC3 Frame** with keywords is shown below:

```
PC3.Add.driver                      Keyword Selection   Module  PC3
_____

            ---------- ********** Additional Driver -----------
  Name          : XXXXXXXXXXXXXXXXXXXXXXXXXXXXX      DOB : DD/MM/YYYY
  Driving Status: ***************        Acc/Conv       : ***
  Sex           : ******               Penalty Points : ***
  Marital Status: ***************       Commuting      : ***
  Rel. To Prop  : ******************    Private Mileage : 999999
  Entry Date    : DD/MM/YYYY            Business Mileage: 999999
  Licence Type  : *************         Disabled       : ***
  Licence No.   : XXXXXXXXXXXXXXXXX     Smoker/Drinker : *** / ***
  MyLicence Cnsnt: ***                  Homeowner      : ***
  Country Issued: ********************
  Date Obtained : DD/MM/YYYY Tests: 99
  Occup. (F.T) : **************************** Emp. Status: ****************
  Bus. Category: **************************** Emp. Status: ****************
  Occup. (P.T.): **************************** Driving Qualification: ***
  Bus. Category: **************************** Pass Plus  : DD/MM/YYYY
   Personal Bus: ***       Anothers Business: ***   Carriage of Goods: ***
  Proposers Bus: ***   Soliciting for Orders: *** Public/Private Hire: *** / ***
  Other Vehs: ***
  Own Veh   : *** NCB: DD/MM/YYYY Veh Type: ****************** Ins of Veh: XXXX
  Comp. Car : *** NCB: DD/MM/YYYY End Date: DD/MM/YYYY       Priv Use  : ***
  SPACE BAR - Add    F2 - Insert Module    RETURN - Add and Exit    F3 - Exit
```

Field Name	Keyword
Additional Driver	PC3.Add.driver
Name	PC3.Name
Driving Status	PC3.Driver.status
Sex	PC3.Sex
Marital Status	PC3.Marital.status
Rel. To Prop	PC3.Relation

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Entry Date	PC3.Dateinuk
Licence Type	PC3.Lictype
Licence No.	PC3.Drivinglicencenumber
MyLicence Cnsnt	PC3.Mylicdvrcnsnt
Country Issued:	PC3.Licence.country
Date Obtained	PC3.Dateobt
Tests	PC3.Driving.tests
DOB	PC3.Dob
Acc/Conv	PC3.Acc.conv
Penalty Points	PC3.Penalties (ROI only)
Commuting	PC3.Commuting
Private Mileage	PC3.Private.mileage
Business Mileage	PC3.Business.miles
Disabled	PC3.Disabl
Smoker/Drinker	PC3.Smoker PC3.Drinker
Homeowner	PC3.Homeowner
Occup. (F.T)	PC3.Occode PC3.Occ
Bus. Category	PC3.Ft.bus.category
Emp. Status	PC3.Status
Occup. (P.T.)	PC3.Pt.abi.job

Emp. Status	PC3.Pt.emp.status
Bus. Category	PC3.Pt.bus.category
Pass Plus	PC3.Passplus
Personal Bus	PC3.Personal.bsness
Proposers Bus	PC3.Prop.business
Anothers Business	PC3.Anothers.bsness
Soliciting for Orders	PC3.Soliciting
Carriage of Goods	PC3.Carriageofgoods
Public/Private Hire	PC3.Hire PC3.Private.hire
Other Vehs	PC3.Other.vehicles
Own Veh	PC3.Own.vehicle
NCB	PC3.Ownvehncbdate
Veh Type	PC3.Ownvehicletype
Ins of Veh	PC3.Own.insurer
Comp. Car	PC3.Company.vehicle
NCB	PC3.Compvehncbdate
End Date	PC3.Companydateend
Priv Use	PC3.Company.private

PC3 Risk Level Frame

The **PC3 Risk Level** Frame is shown below:

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PC4 Frame

Field Name	Keyword
Rugs & Coats	PC4.Rugs
Manslaughter Indemnity	PC4.ManInd

Pa Benefits	PC4.PaBen
Driving Other Cars	PC4.Otcars

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PC5 Frame

```
Connection | Setup | History

  PC5.NCB                              Keyword Selection    Module   PC5
  _____


            *  NCB Protection following theft ***           (Add Prem 999.99 )
  Additional* Medical Expenses - limit      99999           (Add Prem 999.99 )
  Benefits  * Rugs, Coats etc. - limit      99999           (Add Prem 999.99 )
            * XXXXXXXXXXXXXXXX - limit       99999           (Add Prem 999.99 )


     PA     * Any Person ***   Any Driver ***      Named Person(s) 99
  Benefits  * Weekly Benefit :  Insured ***  Spouse ***    (Add Prem 999.99 )
```

Field Name	Keyword
NCB Protection following theft	PC5.NCB
Add Prem	PC5.Addprem1
Medical Expenses - limit	PC5.MedExp
Add Prem	PC5.Addprem2
Rugs, Coats etc. - limit	PC5.Rugs
Add Prem	PC5.Addprem3
limit	PC5.Ext1 PC5.Extlim
PC5.Addprem4	PC5.Addprem4
Any Person	PC5.Anyper

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Any Driver	PC5.Anydriver
Named Person(s)	PC5.Namedper
Weekly Benefit : Insured	PC5.Ins
Spouse	PC5.Spouse
Add Prem	PC5.Addprem5

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PC6 Frame

```
Connection | Setup | History

  PC6.Nocars                              Keyword Selection    Module   PC6
  _____

   Other      *     No of Cars on Policy 99          Married ***    AA Member ***
   Details    *      Est. Annual Mileage 999 ,000 Any Children ***  RAC Member ***
              *           Broker Scheme ***                        IAM Member ***
```

Field Name	Keyword
No of Cars on Policy	PC6.Nocars
Est. Annual Mileage	PC6.AnnMiles
Broker Scheme	PC6.Brokscheme
Married	PC6.Married
Any Children	PC6.Anychild
AA Member	PC6.AAMem
RAC Member	PC6.RACMem
RAC Member	PC6.IAMMem

PC7 Frame

```
Connection | Setup | History

  PC7.Cover                           Keyword Selection   Module   PC7


   Trailer   *  Type of Cover ************   Value  99999   (Add Prem 999.99 )
   Details   *  Livestock / Plant attached ***
```

Field Name	Keyword
Type of Cover	PC7.Cover
Value	PC7.Val
Add Prem	PC7.Addprem
Livestock / Plant attached	PC7.Attach

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PC8 Frame

```
Connection | Setup | History

  PC8.Comm1                           Keyword Selection   Module   PC8


            *  XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX
  Comments  *  XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX
            *  XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX
```

Field Name	Keyword
Comments	PC8.Comm1 - PC8.Comm3

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Locate Bookmark

PC9 Frame

```
Connection | Setup | History

  PC9.Addr1                              Keyword Selection    Module  PC9


    Garaging    *   XXXXXXXXXXXXXXXXXXXXXXXXXXXXXX
    Address     *   XXXXXXXXXXXXXXXXXXXXXXXXXXXXXX
                *   XXXXXXXXXXXXXXXXXXXXXXXXXXXXXX
                *   XXXXXXXXXXXXXXXXXXXX          Post Code XXXXXXXXXX
```

Field Name	Keyword
Garaging Address	PC9.Addr1 - PC9.Addr4
Post Code	PC9.PCode

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The ERM Frame (Quote Enrichment)

The **ERM** Frame and its keywords are shown below:

```
Connection  Setup  History

   ERM.Service                        Keyword Selection   Module  ERM
   _____

     INSURER QUOTE ENRICHMENT DETAILS
       Enrichment Service: ********************
     Enrichment Quote Ref: XXXXXXXXXXXXXXXXXXX    Date/Time: DD/MM/YYYY / XXXXX
      Insurer Scheme Code: XXXX                  Open GI Log Id: XXXXXXXXXXXXXXXXXXX
                   Result: ******
```

Field	Keywords	Description
Enrichment Service	ERM.Service	The Enrichment Service that has applied.
Enrichment Quote Ref	ERM.enrichmentrequestid	Unique identifier returned from insurer's enrichment web service for this particular enrichment event. This helps with any investigations.
Date/Time	ERM.enrichmentdate / ERM.enrichmenttime	Datestamp from Open GI enrichment hub when it got a response from insurer's enrichment service
Insurer Scheme Code	ERM.Insurerscheme	The insurer scheme code.
Open GI Log Id	ERM.Ogixmllogid	This is an additional piece of information to assist with any potential investigation work (for Open GI and/or the Insurer) connected to the enrichment.
Result	ERM.Result	The result and error message if a failure: "Success" or "Failure"

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Locate Bookmark

EXS Frame (Enhanced Excesses)

The EXS frame stores product policy excess details. The frame appears once per policy for Motor, Bike and Truck.

These keywords can be used to extract/print the excess details from the frame and you can report on these fields using database enquiry.

Refer to the BrokerLink Excess Override and Enhanced Excesses section for further details.

Accidental Damage - Quoted	EXS.Xsadquoted
Accidental Damage - Revised	EXS.Xsadrevised
Accidental Damage - Voluntary	EXS.Xsadvoluntary
Accidental Damage - Total Excess	EXS.Xsadtotal
Fire - Quoted	EXS.Xsfquoted

Fire - Revised	EXS.Xsfrevised
Fire - Voluntary	EXS.Xsfvoluntary
Fire - Total Excess	EXS.Xsftotal
Theft - Quoted	EXS.Xstquoted
Theft - Revised	EXS.Xstrevised
Theft - Voluntary	EXS.Xstvoluntary
Theft - Total Excess	EXS.Xsttotal
Malicious Damage - Quoted	EXS.Xsmdquoted
Malicious Damage - Revised	EXS.Xsmdrevised
Malicious Damage - Voluntary	EXS.Xsmdvoluntary
Malicious Damage - Total Excess	EXS.Xsmdtotal
Windscreen - Quoted	EXS.Xswquoted
Windscreen - Revised	EXS.Xswrevised
Windscreen - Total Excess	EXS.Xswtotal
Excess Type	EXS.Supp01xstype - EXS.Supp10xstype
Excess Value	EXS.Supp01xsvalue - EXS.Supp10xsvalue
Applies To	EXS.Supp01appliesto - EXS.Supp10appliesto

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Locate Bookmark

8: Appendix: Ireland

Appendix: Motor ROI

In most instances, the ROI version of MotorWriter is the same as the UK and NI version.

This section details the specific differences between the ROI MotorWriter and UK and NI MotorWriter.

These are:

- Motor ROI Penalty Points

- The PEN Frame ROI

- Cover Details ROI on quote screen (district instead of postcode. The **Eircode** field is used identify delivery points by allocating a unique delivery code).

- Personal Details ROI on quote screen (additional Driver Qualification and Driving History questions) The **Eircode** field for Name and Address dialog.

- Entering Additional Driver Details ROI on quote screen (additional Penalty Points question)

- The Quotation Printout (ROI) includes the Eircode fields

Brokers in the Republic of Ireland can now use frame calculations to set the new Client and Prospect **Eircode** fields. Refer to the Frame Calculations on Core Back-Office Client and Policy Screens page for further details.

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Motor ROI Penalty Points

Introduction

The **Penalty Points** field in Motor ROI allows you to capture, store and update Penalty Points within MotorWriter and to preserve the captured details through BrokerLink ROI. This allows you to maintain a true reflection of Penalty Points associated with a driver during a policy lifecycle.

Refer to the Entering Penalty Points (ROI) page.

Penalty Point information is stored in the PEN Back-Office frame.

As this information will be stored against the risk, this information will be available for access via Database Enquiry, InfoCentre and is also available for letter production.

New Business

Motor ROI has an additional Penalty Points field for penalty point data capture as part of the New Business process.

Mid Term Adjustments and Renewals

To cater for manual claims and convictions, you can update Penalty Point details in the PEN risk frame when changes are notified to you by the client as part of either a Mid Term Adjustment or declaration process, before the risk is invited for Renewal.

Should a Mid Term Adjustment need to be performed on the risk which has come into effect, the current manual update process (ESC E) can be used to update the corresponding risk data within Core Back-Office or the PEN Frame can be updated directly. This information will then be incorporated into the EDI Risk data at the time of the next rebroke on an EDI product.

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Entering Penalty Points (ROI)

To enter penalty points into MotorWriter ROI, follow the process below:

1. Enter "Yes" in the **Penalty Points** field and press the TAB button.

2. The **Penalty Points** window is displayed. Enter any penalty points associated with the driver. You can enter up to 5 sets of Penalty Points per driver, but a maximum of 10 per policy.

Date	Enter the date the offence occurred in the format DD/MM/YYYY or click on the drop-down list to display a calendar for date selection:

When the **OK** button is pressed, the penalty points information entered is then sorted in date order with the earliest ones first.

Description	Select a description of the offence from the drop-down list.

Pnts	Enter the penalty points received, as recorded by the Road Safety Authority.

3. Press the **OK** button (RETURN). Details of the penalty point(s) are stored in the PEN frame if the risk is saved back to Core Back-Office or Advanced Prospect Management.

The PEN Frame (ROI)

The details of the captured Penalty Points for the driver are saved to the corresponding risk PEN frame when the risk is saved back to the Core Back-Office, Advanced Prospect Management or is placed on cover via BrokerLink ROI.

PEN Frame Keywords

```
PEN.Date1                               Keyword Selection   Module  PEN


 Offence    Description                    Number of Penalty Points Driver
  Date
DD/MM/YYYY ***********************************************************999 *****
DD/MM/YYYY ***********************************************************999 *****
DD/MM/YYYY ***********************************************************999 *****
DD/MM/YYYY ***********************************************************999 *****
DD/MM/YYYY ***********************************************************999 *****
DD/MM/YYYY ***********************************************************999 *****
DD/MM/YYYY ***********************************************************999 *****
DD/MM/YYYY ***********************************************************999 *****
DD/MM/YYYY ***********************************************************999 *****
DD/MM/YYYY ***********************************************************999 *****







 SPACE BAR - Add    F2 - Insert Module    RETURN - Add and Exit    F3 - Exit
```

PEN.Date1 - Pen.Date10	The Offence Date
PEN.Desc1 - Pen.Desc10	Description of the offence.
PEN.Points1 - PEN.Points10	Number of Penalty Points
PEN.Driver1 - PEN.Driver10	Driver

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Cover Details (ROI)

This section describes how to complete the **Cover Details** window for ROI, as shown below:

As with the previous windows, you may not be required to complete all the fields. The more details you enter, the more accurate the quote.

Cover	Select the type of cover required: "Comprehensive", "Third Party Fire and Theft" (TPFT) or "Third Party Only" (TP Only).
Years NCB	Enter the number of years of No Claims Bonus. The system displays a window with the following two fields that you should complete.
Prot.Bonus?	Enter "Yes" or "No" to indicate whether insurance protection is required for the No Claims Bonus. If you leave this field blank the system defaults to "No".
Step Back?	Enter "Yes" or "No" to whether step back protection is required.
Cover Date	The system automatically enters the current date in this field. You can change this if required. You can only enter a date for which the system contains rating information.
Eircode	Every delivery point in Ireland is allocated with a unique delivery code. Enter the district where the vehicle is normally kept overnight.
District	From the drop-down list, select the district where the vehicle is normally kept overnight.

If you enter an invalid date the system displays the following message:

    WARNING: Rates are not available for this cover date

When you have completed all the necessary fields press RETURN to continue.

If you have specified additional drivers then the system provides the additional driver window for you to complete.

Refer to Entering Additional Driver Details for details on how to complete additional driver details.

If the proposer is the only driver then you can select from one of the following options:

- press ESC **W** to select an individual insurer and generate a quote.

- press the **Quote Selected** button (ESC **Q)** to select a list of insurers and start the quotation procedure.

- press the **Quote All** button (ESC **A)** to start the quotation procedure for all the insurers on the system.

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Personal Details (ROI)

Personal Details (ROI)

This section describes how to complete the **Personal Details** window for ROI. When you enter "Yes" in the **Personal Details** field the system displays the **Personal Details** window:

The system contains default details in some of the fields. You can change the defaults that are displayed using the 'Default Setup' option from the Main Options menu.

Refer to Setting Up Defaults for details of how to configure default setups.

Residency	The system automatically enters the number of years of residency when you enter the date of birth, if this is incorrect you can amend it now.
Licence Type	Enter the type of licence currently held by the proposer.

Licence No.   Enter the driving licence number. Enter up to 18 characters.

Period Held   Enter the number of months or years in the first field, that the proposer has held a licence. If the licence is less than one year old, enter the number of months and enter "M" in the second field. Otherwise enter "Y" for years.

Country Issued   Enter the country in which the licence was issued. Use the pop-up help to obtain a list of available entries.

Motor Orgs   Enter the motoring organisation that the proposer currently belongs to.

Driver Qualification   Enter "Yes" to enter details of any driving qualifications:

Qualification Type Select the driving qualification held from the drop-down list.

Date Obtained Select the date obtained from the calendar.

Driving History   Enter "Yes" or "No" to whether this driver is or has ever been a named driver on someone else's policy.

Enter "Yes" and the **Driving History** dialog is displayed:

Whose Policy From the drop-down list, select on whose policy the driving experience was gained.

Policy Type From the drop-down list, select the type of vehicle te driving experience was gained in.

Insurer From the drop-down list, select the insurer of the vehicle.

Years Driving Enter a value from 0 to 99. Enter the number of years the driver was the named driver on the other policy.

Date Ended Enter the date when this driver stopped driving on the other policy.

| **Other Vehicles** | Enter "Yes" or "No" to indicate access to other vehicles, including past use of a company car. If you say "Yes", the system displays an additional pop-up window which allows you to detail additional car information. |

Refer to for details of how to complete the **Other Vehicles** screen.

| **Commuting** | Enter "Yes" or "No" to indicate whether the proposer uses the vehicle for commuting purposes. |

| **Extended Use** | Enter "Yes" or "No" if the car is used for business. If you enter "Yes", the system displays an additional pop-up window which allows you to detail the additional uses. |

Refer to for details of how to complete the additional window fields.

Private Mileage   Enter an estimate of annual private mileage for that driver in that car.

No. of Tests   Enter the number of driving tests taken.

Homeowner   Enter "Yes" or "No" to indicate if the proposer is a homeowner.

Smoker   Enter "Yes" or "No" to indicate if the proposer is a smoker.

Drinker   Enter "Yes" or "No" to indicate if the proposer is a drinker.

Name and Address   Enter "Yes" if you want to enter the proposer's name and address details. The system displays an additional window which allows you to complete the following fields:

Title, Surname, Forenames Enter the proposer's full name.

Address Enter up to 4 lines for the proposer's address. This is not required to generate a quote.

If you have a licence for Open Address Lookup, an *will be displayed against the 1st line of the address field. Clicking on this (or pressing **F1**) will present the Open Address Lookup dialog.*

Eircode Every delivery point in Ireland is allocated with a unique delivery code. Enter the district where the vehicle is normally kept overnight.

District Enter the district where the proposer is permanently resident.

Accidents   Enter "Yes" or "No" to indicate whether the proposer has had any accidents within a specified period. If you enter "Yes", the system automatically displays the **Accidents** screen.

Refer to Entering Accident Details for details of how to complete the **Accidents** screen.

Convictions   Enter "Yes" or "No" to indicate whether the proposer has any convictions. If you say "Yes", the system automatically displays the **Convictions** screen.

Refer to the section on Conviction Details for more details of how to complete the **Convictions** screen.

Disabilities   Enter "Yes" or "No" to indicate whether the proposer is disabled. If you enter "Yes", the system automatically displays the **Disabilities** screen.

Refer to the section on Entering Disability Details for details of how to complete the **Disabilities** screen.

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Entering Additional Driver Details (ROI)

This section describes how to complete the details for an additional driver. Since the cover and vehicle details are the same you need only to enter the personal details of the additional driver or drivers. The **Additional Driver** window is displayed if the proposer wants to include named drivers. The system allows you to include up to four named drivers.

Sex	Enter "M" for Male or "F" for Female. This is a mandatory field.
Date of Birth	Enter the additional drivers date of birth. The system automatically calculates the age.
Driving Status	Enter the additional drivers status: "Main driver", "frequent driver", "casual driver", "non-driving".
Employ Details	This allows you to access the **Occupation Details** window. Enter "Yes" if you want to enter the additional drivers occupation details.

Refer to Employment Details for details of how to enter occupation information for the additional driver.

Personal Details	This allows you to access the **Personal Details** window to enter the additional drivers personal information. Enter "Yes" if you want to enter the details.

Refer to Personal Details for details of how to enter personal details. The procedure is identical to the proposer details.

Relationship	Enter the relationship of the driver to the proposer. Use the pop-up help to obtain the list of available entries.
Accidents	Enter "Yes" or "No" to indicate whether the driver has had any accidents within a specified period. If you enter "Yes", the system automatically displays the **Accidents** window.

Refer to Entering Accident Details for details of how to complete the **Accidents** window.

| **Convictions** | Enter "Yes" or "No" to indicate whether the driver has any convictions. If you say "Yes", the system automatically displays the **Convictions** window. |

Refer to the section on the Convictions screen for more details of how to complete the **Convictions** screen.

| **Disabilities** | Enter "Yes" or "No" to indicate whether the driver is disabled. If you enter "Yes", the system automatically displays the **Disabilities** window**.** |

Refer to the section Entering Disability Details for details of how to complete the **Disabilities** window.

| **Penalty Points** | Enter "Yes" or "No" to whether this driver has penalty points. |

The cover and other details do not need to be changed as they always apply to the proposer.

When you have completed all of the necessary fields press RETURN or **F11** to move on to the next screen.

When you have completed all the additional driver fields select one of the following options:

- press ESC **W** to select an individual insurer and generate a quote.

- press the **Quote Selected** button (ESC **Q** or RETURN) to select a list of insurers and start the quotation procedure.

- press the **Quote All** button (ESC **A)** to start the quotation procedure for all the insurers on the system.

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The Quotation Printout (ROI)

The Quotation Printout for Ireland contains the **Eircode** fields, as shown in the example below:

```
Client : Mr A A                              Ref :
         A
         A
         A
         A
         xxxxxxxxxx
         Durrus                  CX38


Quote : Allianz 1st Car F/C EDI          451.28  (G)  Excess :      250
        Includes Government Levy of EUR    21.49 at 5.00%
Terms :

CAR DETAILS
              ABI Code : 39044802      Code :   4128012
                  Make : PEUGEOT
                 Model : 407 S SW
                    CC : 1749       Year Made : 2007
     Registration Mark : 99 d 12345     Value :    5000
                 Doors : 5             Seats :   5
          Transmission : Manual    Fuel Type : Petrol
            Body Style : Estate       Finish :
                Colour :                  LHD : No
               Parking : Garaged
                 Owner : Proposer     Keeper : Proposer
         Purchase Date : 09/12/2008

              Modified : No

COVER DETAILS
            COVER DATE : 29/07/2014          Cover : Comprehensive
           Policy Term : 12
        Garaged Eircode: xxxxxxxxxx
        Garaged Address : Durrus          CX38
               Drivers : Insured Only
            Windscreen : No                  Protect NCB : No
        Holding Broker : No              Scheme Number :
   Ever held Insurance : Yes        Voluntary Excess :
      Any Other Claims : No               Step Back: No
       Business Source : Broker Office
       Current Insurer : Chartis Europe Limited
        Current Scheme : AIG Mature FCEDI (CAFE)
          Period Since :
 Motoring Organisations :
             Telephone :                    Audio :
             Years NCB : 10          NCB Country : Ireland
              NCB Type : Private Car
```

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